

INDIVIDUALS

END OF YEAR CHECKLIST

We take pride in the relationships formed between ourselves and our clients: Our vision is for you to feel that the accountant client relationship is our highest priority.

- PAYG Summaries/Group Certificates
- Centrelink PAYG Summaries (Group Certificate)
- Trust or dividend income
- Interest and dividend deductions
- Overseas income
- Eligible termination payments income
- Work related car expenses
- Self-education expenses/seminars
- Work related travel expenses
- Uniform expenses and protective shoes/clothing
- Private Health Care Statement of membership for the year
- Union or membership fees
- Cost of tools and equipment used for work
- Computer costs if used for work
- Work related telephone calls and internet expenses
- Reference books and trade journals
- Donations of \$2 or more
- Cost of managing tax affairs
- Deductible Superannuation Contributions
- Capital Gains
- Income Protection
- Home office
- HELP/SFSS
- Depreciable assets

This information is intended as a guide only and no responsibility is accepted by Mayberry Meldrum and Anderson for any errors or omissions and the above information should be used in conjunction with advice from your Accountant.

