



Your Handy Tax Checklist

Grow Advisory Group's Checklist will help you gather the relevant information you need to get the best from your 2019 Tax Return.

INCOME

- ☐ Payment summaries
- ☐ Lump sum & termination payment summaries
- ☐ Bank interest received
- ☐ Distributions
- ☐ Government payment statements (Centrelink)

DEDUCTIONS (Work related expenses)

- ☐ Motor vehicle expenses
- ☐ New vehicle purchase
- ☐ Uniforms/work wear
- ☐ Telephone, computer, internet
- ☐ Tools of trade
- ☐ Income protection insurance
- ☐ Stationery
- ☐ Home office furniture

OTHER INCOME

- ☐ Rental property
- ☐ Business
- ☐ Foreign income
- ☐ Capital gains
- ☐ Employee share schemes

OFFSETS AND REFUNDS

- ☐ Private health insurance statement
- ☐ Tax agent fees from last year
- ☐ Donations to charities

**Like a free home loan check-up?
Just bring the following:**

- 2 x Payslips
- ID
- Latest home loan statement

**For appointments please
contact us:**

Tweed Office: 07 5599 5700

Nerang Office: 07 5502 1388