

## END OF FINANCIAL YEAR CHECKLIST FOR INDIVIDUALS

- PAYG SUMMARY
- INTEREST AND DIVIDEND INCOME
- CAPITAL GAIN INFORMATION FOR PURCHASE AND SALE OF ASSETS
- MANAGED FUND ANNUAL TAX SUMMARY
- INVESTMENT PROPERTY INCOME AND EXPENSE DETAILS
- INCOME PROTECTION, SUPER
- DEDUCTIONS INCLUDING DONATIONS, SELF EDUCATION, UNION, MEMBERSHIPS
- PRIVATE HEALTH INSURANCE LETTER
- MEDICAL EXPENSES IF MORE THAN \$1,500
- BANK DETAILS IN EVENT OF A REFUND