Required Client Records

Individual income tax returns (new client)

End-to-End Accounting

Full name of taxpayer

Date of birth

Address

Tax file number (TFN)

Contact number

Email address

Spouse full name

Spouse tax file number (TFN)

Spouse taxable income

Client records required

Client records required	Information provided	Not applicable
Bank account name, number and BSB (if new client or if account details have changed)		
Bank interest (including any issued by a Building Society or Credit Union)		
Car expenses details (including logbook and invoices if required)		
Capital Gains Have you sold any assets during the financial year? Require purchase and sale documents		
Copies of rental agent statement for the year If not managing agent then summary of all income and expenses and invoices (e.g. advertising costs, body corporate fees, borrowing expenses, capital works, cleaning costs, depreciation schedule gardening and maintenance expenses, insurance, interest, land tax, legal fees, postage, rates, stationery and security costs)		
Distributions from trusts, partnerships or managed funds annual statements		
Dividends statements (including any dividend reinvestment plan or share buyback details)		
Income protection insurance policies		
Medical expenses (if aged care facility or disability aids)		
Notice of intention to claim personal superannuation contributions (if applicable)		
PAYG payment summary or ETP statements		
Private health insurance statement		
Receipts and invoices for work-related expenses (e.g. union fees, subscriptions, protective clothing, safety boots, employer uniforms tools of trade, self-education costs)		
Statement of Government social security pensions or allowance income streams		
Statement of income received in respect of insurance policies		