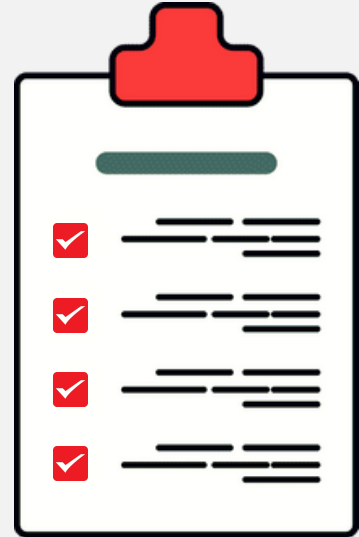




TAX RETURN CHECKLIST



INCOME STATEMENTS

Payment summaries or income statements from all sources of income, including your employer(s), bank interest, government payments, dividends, rental income, and any other sources of income.



EXPENSE RECORDS

Grab your bills and receipts for any deductions you plan to claim. This may include work-related expenses, donations, self-education expenses, or other eligible deductions.



MEDICARE LEVY EXEMPTION

If you are exempt from paying the Medicare levy, ensure you have the appropriate exemption certificate.



PRIVATE HEALTH INSURANCE

If you have private health insurance, have your statement from your insurer summarising your premiums paid and any rebates received.



CAPITAL GAINS AND LOSSES

If you have sold any assets, such as property, shares, or cryptocurrency, gather the details of the transactions and any associated costs.



RENTAL PROPERTY DETAILS

If you own an investment property, compile the income and expense details related to the property.



BUSINESS RECORDS

If you run a business or work as a sole trader, gather records of your business income and expenses.

**READY TO LODGE YOUR
TAX RETURN?**

Head to [Pisanigroup.com.au](https://www.pisanigroup.com.au)
or call us on 1800 004 224

