



Slavin & Co Pty Ltd **284 Wells Road**
Accountants & Advisors **Aspendale Gardens Vic 3195**

Kevin Slavin, Fellow CPA **T (03) 9580 3444 F (03) 9587 7140**
Registered Tax Agent **E kevin.slavin@iinet.net.au**

Tax Document File

Client Name _____ Year ending _____

Address _____ Telephone Number (H) _____ (M) _____

Email Address (H) _____ (W) _____ Telephone Number (W) _____ (M) _____

Income Details

- PAYG Summaries
- Centrelink Statements
- ETP Statements
- Superannuation Income
- Superannuation Lump Sum Payments
- Bank Interest – Australian & Overseas
- Dividend Statements – Australian & Overseas
- Partnership, Trust & Business Income
- Sale of Assets – Australian & Overseas
- Foreign Income & Pensions
- Rental Income & Expenses – Australian & Overseas
- Other Income Details

Deductions

- Motor Vehicle Expenses
- Travel Expenses
- Work Clothing Expenses
- Self Education Expenses
- Other Work Related Expenses
- Investment Deductions
- Donations & Gifts
- Tax Agent Fees
- Income Protection Premiums
- Superannuation Concessional Contributions
- Other Deductions: _____

Spouse/Partner Details

- Name _____
- Date of Birth _____
- Tax File Number _____
- Taxable Income _____
- FBT Reportable Amounts _____

Tax Offsets

- Education Tax Refund Details for Students
- Health Fund Annual Statement of Cover
- Medical Expenses
- Medicare & Private Health Fund
- Annual Statement of Claims & Benefits
- Superannuation Income Stream Rebate