



## **Your Tax Return Interview**

### **What to Bring**

When you book in to get your tax return completed with G2 Accounting, there are a couple of things we need to ensure we can lodge your tax return. At a minimum, we require the following to complete your tax return, unless we already have it from previous years:

- Your Tax File Number (find this on a previous tax return, or on some ATO notices); and
- Your bank account details (Account Name, BSB and Account Number)
- If you owned shares we'll need details of any purchases and sales as well as dividend statements relating to those investments.
- Rental income and expenses (incl rates, water, insurance, repairs, interest body corp etc)

If you have them handy, we'd also appreciate if you bring along the following, to help your accountant get the best outcome for you:

- Your previous tax return (for new clients);
- Any receipts you kept from expenses that related to your work. Some common ones are:
  - Union or Professional Association fees;
  - Mobile & home phone and internet, if you use them partly for work
  - Stationery, tools or equipment purchases that relate to your work
  - Computer expense, if you used it partly for work;
  - Professional magazines or trade publication purchases;
- Your accountant's receipt for last year's tax return (for new clients)
- Receipts for any charitable donations you made;
- Any other records that we've previously suggested you keep.

If you have any questions, please feel free to call us prior to your interview on (03) 9855 0236.

We look forward to seeing you soon!

G2 Crew!