

## Your Handy Tax Checklist

Grow Advisory Group's Checklist will help you gather the relevant information you need to get the best from your 2020 Tax Return.

### INCOME

- Payment Summaries
- Lump Sum & Termination Payment Summaries
- Bank Interest Received
- Distributions & Dividends
- Government Payment Statements (Centrelink)

### OTHER INCOME

- Rental Property - Agents Statement
- Business
- Foreign Income
- Capital Gains
- Employee Share Schemes
- Income Stream

### DEDUCTIONS (Work Related Expenses)

- Motor Vehicle Expenses
- New Vehicle Purchase
- Uniforms/Work Wear
- Telephone, Computer, Internet
- Tools of Trade
- Income Protection Insurance
- Stationary
- Home Office Furniture
- Donations to Charities
- Self Education

### OFFSETS AND REFUNDS

- Private Health Insurance Statement
- Tax Agent Fees from last year
- Superannuation Contributions

**Would you like a FREE  
Home Loan Check-up?  
Just bring the following:**

- 2 x Payslips
- ID
- Latest Home Loan Statement

**For appointments please  
contact us:**

**Tweed Office: 07 5599 5700**

**Nerang Office: 07 5502 1388**