



**Precent**  
TAX & ACCOUNTING

# Tax Return Checklist

## Work Related

- Payment Summary or Group Certificates
- If no payment summary, then TFN is compulsory
- Any work related expense receipts or summary

## ID and Visa Status

- Passport or Driver License for Id purpose
- Current Visa Status

## Contact & Other Details

- Email Address
- Contact Number (Mobile Preferred)
- Current Address (if different from the Payment Summary)
- Marital Status - Single or Married. If married, please provide Spouse Name, DOB & Annual Income
- Bank Details - BSB & Account Number

## If working from home

- From and To Date worked from home
- Average weekly hours worked from home

## Uber / UberEats / Deliveroo / Taxi

- ABN Number
- If car used, pls provide car details
  - Car make and model
  - Car purchase date and cost
- All Monthly Statements from their profile
- Annual Tax Statement issued by Uber or Deliveroo
- For Uber & Taxi, has all quarterly BAS been lodged?
  - If yes, then record of lodged statement and amount paid for lodgements
  - If No, then we have to lodge them all before we lodge a tax return.  
(\*Additional charges applies)