Tax Help

Appointment confirmation



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It's easier to manage your Tax and Super with myGov. Don't have myGov? We can help you.

To prepare your tax return, you must bring the following information (where applicable) to your appointment:

- your myGov user ID and password
- your tax file number
- a notice of assessment received in the last five years
- vour BSB and bank account details
- your Medicare card or number
- your private health insurance statement showing your fund details
- all your statements from banks and financial institutions showing interest you received during the income year
- all your PAYG payment summaries from your employers
- all your payment summaries from super funds

- details of all your income from Centrelink or Department of Veterans' Affairs (including details of any tax-free pensions or benefits)
- all your dividend, super and managed fund statements
- all your foreign income details and pension statements or details of the amounts you
- all your employment termination payment summaries
- all your receipts for gifts, donations and work-related expenses
- your details of any child support payments
- your details of any losses on investments in shares and rental properties (net investment losses).

If you had a spouse - married or de-facto - at any time during the financial year.

you also need to bring details of their taxable income, including any of their documents, to your appointment. We will need this information to complete certain labels on your income tax return. If you cannot find out your spouse's exact taxable income, you will have to make a reasonable estimate of the amounts received by your spouse.



Australian Government **Australian Taxation Office**

Create a myGov account

Creating a myGov account is simple:

- go to my.gov.au and click the Create a myGov account button
- enter your email address
- read and accept the terms of use
- enter your confirmation code
- you'll now be asked to create a password
- choose and answer three secret questions

Once you've created a myGov account you can link member services such as the ATO.

Link the ATO to your myGov account

To link to the ATO:

- setup your myGov account
- login to myGov
- click the Services button on your myGov home page
- click the Link icon next to 'Australian Taxation Office'.

Go to ato.gov.au/myGovlinking for help with creating a myGov account and linking to the ATO.

Lodging your first tax return

If this is your first year lodging a tax return, here are some tips to make tax time simple. We can help you if you're unable to do this. The easiest and fastest way to lodge your tax return is online using myTax. To lodge online you'll need a myGov account linked to the ATO.

- Have your Tax file number (TFN) handy and either your birth certificate, passport or citizenship certificate
- create a myGov account
- call 132861 and press 5 to get your unique linking code
- sign into myGov and link to ATO.