

CHECKLIST FOR DOCUMENTS WE REQUIRE TO COMPLETE SELF-MANAGED SUPERANNUATION FUND INCOME TAX RETURN

- Dividend Statements, Annual Tax Distribution Statements for Investments held in Unit Trusts or Managed Funds
- Bank account statements from 01/07/2013 to 30/06/2014 or an internet download saved as a CSV file or HTML for the above dates
- Cheque books and deposit books
- Instalment Activity Statements
- Details of any employer or employee contributions
- Any ETP or roll over statements from other funds or termination of employment
- Buy/Sell Contract Notes re share investment transactions during the year
- Estate Agent rental property Annual Statements

If you wish to forward your support documentation electronically, you can email it directly to jasmine@bbandco.com.au alternatively provide us with a USB or CD with your information.