

Tax season 2017 is here.

The checklist below offers some simple guidance as to what you should consider when preparing for your 2017 personal taxation appointment, with your friendly Accountant.

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| <input type="checkbox"/> PAYG payment summaries (Group Certificates) | <input type="checkbox"/> Education expenses relating to your work |
| <input type="checkbox"/> Centrelink payment summaries | <input type="checkbox"/> Work related membership fees e.g. Union, professional bodies etc. |
| <input type="checkbox"/> Eligible Termination Payment summaries | <input type="checkbox"/> Details of work related phone, internet and home office |
| <input type="checkbox"/> Interest earned from bank accounts | <input type="checkbox"/> Motor vehicle log books and expense receipts |
| <input type="checkbox"/> Share dividend statements | <input type="checkbox"/> Work related and protective clothing details |
| <input type="checkbox"/> Employee share scheme statements | <input type="checkbox"/> Tools, equipment and consumables |
| <input type="checkbox"/> Foreign income including pensions | <input type="checkbox"/> Donation receipts |
| <input type="checkbox"/> Details of investments bought and sold | <input type="checkbox"/> Details of HECS/HELP debts |
| <input type="checkbox"/> Investment property details | <input type="checkbox"/> Details of last year's tax agent fee |
| <input type="checkbox"/> Annual trust and managed fund tax statements | <input type="checkbox"/> Spouse's date of birth and taxable income |
| <input type="checkbox"/> Interest and fees on investment loans | <input type="checkbox"/> Your bank account details for your refund |
| <input type="checkbox"/> Health insurance details | |
| <input type="checkbox"/> Income protection insurance details | |

Any other item you think may be relevant. If in doubt, bring it along and we can guide you.

Our standard fee for a basic individual tax return is \$176 (including GST). More complex returns, and business taxation charged at competitive hourly rates. Ask us for an obligation free quote!

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