



Andrew Webb

Family & Business Accounting

Take a *fresh* look at accounting

With tax season 2013 well upon us, visit your new local accounting and taxation firm, and enjoy a fast, simple and stress free taxation service.

Use our checklist below to prepare for your appointment, then call to arrange a suitable time to come in and discuss your return.

- | | |
|---|---|
| <input type="checkbox"/> PAYG Payment Summaries (Group Certificates) | <input type="checkbox"/> Motor vehicle—log books and expense receipts |
| <input type="checkbox"/> Centrelink Payment Summaries | <input type="checkbox"/> Interest and fees on investment loans |
| <input type="checkbox"/> Eligible Termination Payment summaries | <input type="checkbox"/> Work related and protective clothing details |
| <input type="checkbox"/> Interest earned from bank accounts | <input type="checkbox"/> Education expenses relating to your work |
| <input type="checkbox"/> Share dividend statements | <input type="checkbox"/> Tools, equipment and consumables |
| <input type="checkbox"/> Health insurance details | <input type="checkbox"/> Donations (raffle tickets don't count, sorry!) |
| <input type="checkbox"/> Spouse's date of birth and taxable income | <input type="checkbox"/> Out of pocket medical expenses over \$2,120 |
| <input type="checkbox"/> Annual trust and managed fund tax statements | <input type="checkbox"/> Details of HECS/HELP debts |
| <input type="checkbox"/> Details of investments bought and sold | <input type="checkbox"/> Income protection insurance details |
| <input type="checkbox"/> Foreign income including pensions | <input type="checkbox"/> Details of last year's tax agent fee |
| <input type="checkbox"/> Investment property details | <input type="checkbox"/> Your bank account details for your refund (please note the ATO no longer send cheques) |

Any other item you think may be relevant. If in doubt, bring it along and we can let you know if there is anything we can claim.

Our standard fee for a basic individual tax return is \$132 (including GST). More complex returns, and Business Taxation charged at competitive hourly rates.

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