

2019 Financial Year

Tax Time Checklist

Use our simple checklist to help you prepare for your appointment.

Call us on **02 4244 4054** to arrange a suitable time to pop in and complete your 2019 tax return.

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| <input type="checkbox"/> PAYG payment summaries (Group certificates) | <input type="checkbox"/> Motor vehicle log book 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"/> Expenses incurred on work related and protective clothing |
| <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 statement | <input type="checkbox"/> Donations (raffle tickets don't count, sorry!) |
| <input type="checkbox"/> Spouse's date of birth and taxable income | <input type="checkbox"/> Details of HECS/HELP debts |
| <input type="checkbox"/> Annual trust and managed fund tax statements | <input type="checkbox"/> Income Protection insurance details |
| <input type="checkbox"/> Details of investments bought and sold | <input type="checkbox"/> Professional association fees |
| <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 (in case of a refund) |
| <input type="checkbox"/> Voluntary superannuation contributions | |

Our minimum fee for a basic individual tax return is \$198 (including GST). More complex returns, and business taxation charged at competitive rates.

E-signatures available.



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