

Not sure what to bring to your appointment?

We have made it easy to ensure you don't miss out on any deductions you are entitled to claim!

DEDUCTIONS

- Income Protection Insurance
- Travel
- Telephone, Computer, Internet
- Self-Education
- Subscriptions, Union, Registrations & Tools
- Seminars
- Uniforms
- Home Office
- Donations
- Motor Vehicle

OFFSETS AND REFUNDS

- Spouse Details including Taxable & Exempt Income
- Instalment Activity Statements or Details of PAYG Instalments Paid
- Health Insurance & Rebate Entitlement Statement

RECEIVING A TAX REFUND?

If you are receiving a tax refund this year, please ensure to remember your designated financial institution details including Account Name, BSB & Account Number

Don't have the funds to pay upfront? Not to worry, let us know and we will have your refund deposited to us, where we will then take out our accounting fee and transfer you the remaining.

INCOME

We can now access most of this information online

- Rental Income
- Allowances
- Foreign Income
- Net Income/Loss from Business
- Government Pensions & Allowances
- Bank Statements for any Interest Received during the Financial year
- Lump Sum Termination Payments
- Annual Tax Statements from Managed Funds
- Dividends
- Employee Share Schemes
- Personal Services Income
- Capital Gains
- PAYG Summaries from Employers
- Distributions from Trusts, Partnerships & Managed Super Funds
- Superannuation Lump Sum Payments

