

PROVISION OF INFORMATION - TAX SEASON**Electronically for Preparing and Lodging your Income Tax Return**

Personal Details including Full Name, Date of Birth, Current address, Telephone Number/s, marital status including dependants their names and date of birth if any and Bank Account details for depositing of your Refund

If you require our firm deduct our fees from your refund (please note a \$40 administration fee applies to this service) please confirm this in your correspondence together with a note authorising us to prepare and lodge your return on your behalf (this is a secured site operation)

Income Items

All Group Certificates from employment, any other income including Bank Interest, Dividends including imputation credits and for Rental Properties a record of all Income and Expenses, including a copy of the Settlement Statement for new rental property purchases

Also state the age of the property if it is a new purchase and if less than 20 years of age, an approximate cost of construction

Any other income derived from any source within and outside of Australia (an electronic schedule of business income and business deductions may be provided)

Deductions

Relevant Work Related Deductions including Car Expenses, Technology Expenses, Home Office and any other expenses with a detailed Spreadsheet setting out the nature and the amount of work related deductions for each deduction category (please retain your receipts for five years in case of taxation office audit)

Refer below link to eligible deductions:

<https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/>

Details of your Comprehensive **Private Health Insurance**, if any including the type of policy and the Policy Number and currency

Various Rebates are available including Zone, Medical Expenses and Spouse Rebates.

Refer below link to various rebates:

<https://www.ato.gov.au/Individuals/Income-and-deductions/Offsets-and-rebates/>

If you believe you are entitled to these, then please advise particulars.

Once the information has been provided electronically, preferably by email, a telephone consultation can be arranged to finalise your return.

Feel free to contact our office for our related services including corporate accounting and bookkeeping, tax planning business strategies audit services and financial planning and lending services.

Email your information to: aaronm@mtsadelade.com.au