

Tax Return Checklist - Individual

Full Name:

Have your details changed since you last lodged a tax return? Yes No

If yes, please tell us whats new:

Address:

Email: Phone:

Occupation:

We now offer **digital signing via our MYOB Client Portal**. Would you like us to set one up for you?

Yes No I have a MYOB Client Portal and know that I can upload my documents electronically

Information NEM can access as Tax Agent

- | | |
|--|--|
| <input type="checkbox"/> PAYG Payment Summaries | <input type="checkbox"/> Dividends and managed fund distributions |
| <input type="checkbox"/> Superannuation income streams | <input type="checkbox"/> Private health insurance annual tax statement |
| <input type="checkbox"/> Interest on bank accounts | <input type="checkbox"/> Taxable Centrelink payments |

Information I have provided to NEM

Rental Property

- Annual rental statement or rental income
- Period your property was rented during the financial year
(and any private use)
- Interest on loans
- Rates and taxes
- Repairs and maintenance
- Body Corporate Fee
- Insurance (landlord & building)

Assets or Investments

- Purchase or sale of assets or investments during the year

Foreign income

- Details of foreign investments and income earned

Family Information

- Full name, date of birth & taxable income of spouse/de facto
(if married/de facto during the year, provide date this occurred)
- Full names and dates of birth of dependants

Deductions

- Motor vehicle (km's travelled OR all vehicle expenses and log book %)
- Uniform purchases and cleaning costs (occupation specific, logo or protective)
- Rapid Antigen Tests (RAT) required for work
- Work related self education expenses
- Work related seminar, subscriptions or travel expenses
- Home office purchases (computer, software, stationery)
- Number of hours worked from home
- Work related telephone & internet
- Union or professional fees
- Tools of trade (purchase or repair)
- Expenses relating to investment income
- Income protection insurance
- Donations made
- Personal superannuation contributions
(S290-170 acknowledgement notice provided)

Edwards Marshall Financial Solutions (EMFS)

Not only is EMFS able to provide you with a detailed financial plan for your future but it is also able to assist you with your income protection, life and total & permanent disability insurance needs.

- I would like EMFS to contact me.

Smartline Loan Review

Our in house finance specialists can review your current facilities for free to ensure you are receiving the best deal possible.

- I would like Smartline to contact me.

