

Full Name:

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

If yes, please tell us what's 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 am providing 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 (from March 2023 a record must be kept)
- Work related telephone & internet
- Union or professional fees
- Tools of trade (purchase or repair)
- Expenses relating to investment income (borrowings & financial advisor fees)
- Income protection insurance
- Donations made
- Personal superannuation contributions  
(S290-170 Notice of Intent 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.

### Mortgage Choice 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 Mortgage Choice to contact me.