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Build Your Business & Grow Your Wealth

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TAX RETURN CHECKLIST

VERY IMPORTANT – READ THIS FIRST

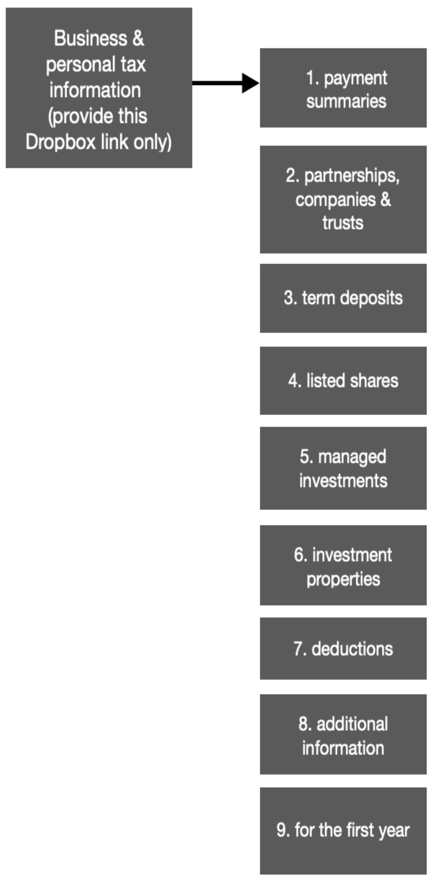
From the 1st July 2019 our practice will be 100% paperless, so we'll no longer be accepting paper tax records sent to us.

We've made the move to go paperless because we believe that every business should be paperless and the best way is for us to lead by example. This means you'll need to scan and upload your files in the format we require and provide us with a link to your files.

Need our help in setting up Dropbox and becoming paperless?
Please make an appointment to come into our office with your laptop. We'll do the complete set up and teach you how to use it. This service is complimentary and takes just 30 minutes. To make an appointment please [CLICK HERE]

Please follow these simple steps to prepare your tax information.

Step 1. [Click here] watch video on how to set up Dropbox to keep your tax records.



Step 2. Set up your folders in Dropbox, as shown in diagram using the exact headings below.

Main Folder:
Business & Personal tax information (provide this link only)

Sub Folders:
1. Payment summaries
2. Partnerships, companies & trusts
3. Term deposits
4. Listed shares
5. Managed investments
6. Investment properties
7. Deductions
8. Additional information
9. For the first year

Step 3. Gather your tax information using the checklist below.

You must answer every question on the checklist. If you leave questions blank or do not provide the information required, we will have to come back to you, so please take your time and get it right.

Step 4. Scan and upload your tax information into Dropbox.

Step 5. Email us (one) link to SHARE your Main Folder: Business & Personal tax information only

ITEM	YES or NO
PAYMENT SUMMARIES	
• Did you receive a payment summary for salaries paid to you or any other types of payments or allowances? Provide copies.	☐ ☐
PARTNERSHIPS, COMPANIES AND TRUSTS	
If you are a business owner;	
• Profit and Loss and Balance Sheet. Not applicable for XERO users	☐ ☐
• Do you have any Loans and leases? Provide statements	☐ ☐
• Did you buy equipment or motor vehicles greater than $20,000? Provide details of purchase and finance contract	☐ ☐
• Did you sell equipment/ motor vehicles? Provide details of items sold	☐ ☐
TERM DEPOSITS:	
• Did you receive interest from bank accounts and term deposits? Provide details	☐ ☐
LISTED SHARES:	
• Did you receive any dividends from shares or sell any shares and make a capital gain or loss? Complete Investment Income Form	☐ ☐
MANAGED INVESTMENTS:	
• Did you receive any dividends from managed fund investments? Please provide annual tax statement from fund manager	☐ ☐
• Did you sell your managed fund and make a capital gain or loss? Complete Investment Income Form	☐ ☐
INVESTMENT PROPERTIES:	
• Do you have any investment properties? Please complete Rental Property Form for each property. Do not send receipts	☐ ☐
• Did you sell any investment properties? Provide description of asset, purchase date and amount, details of any improvements made that forms part of cost base, sale date, proceeds and settlement statement	☐ ☐
WORK RELATED DEDUCTIONS:	
• Did you incur any expenses relating to your employment? Complete Work Related Deductions Form	☐ ☐
• Did you use your motor vehicle in the course of your employment? Complete Motor Vehicle Form	☐ ☐
ADDITIONAL INFORMATION:	
• Private Health Insurance. Provide policy details	☐ ☐
• Details of your current residential address (complete Client Contact Update Form if they have changed)	☐ ☐
• Bank account details for ATO refunds (complete Client Contact Update Form if they have changed)	☐ ☐
FIRST YEAR OF TAX RETURNS WITH US?	
• If you are a new client, provide a copy of last tax return lodged	☐ ☐
• Complete Client Contact Update Form to provide bank account details for ATO refunds and	☐ ☐
• Details of your current residential address and contact details	☐ ☐