



About You:

Full Name: _____

Address: _____

Mobile: _____

Notes for Tax Bridge:

Please contact our office if you would like further information to help prepare for your tax return appointment 9722 9777.

In addition, we offer a 30 minute introductory meeting to new clients.

Additional services available

- Assist new business owners
- Business advice and budgeting tools
- Prepare BAS and answer GST queries
- Rental property tax advice
- Complete self managed superannuation fund tax returns
- Complete deceased estate tax returns



Contact details:
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Fax: 9722 9779



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QUICK AND EASY TAX RETURN SERVICE

- **Local** friendly and professional service
- **Full review** of your situation to maximise deductions and benefits
- **Flexible** hours including Saturday appts during July to October
- **Appointments** completed in 30 mins
- **Eftpos**, credit card and fee from refund available
- **Returns** prepared within 3-5 days
- **Detailed** business & rental property checklists available on our website

We recommend booking early for after hours and Saturday appointments



Tax Bridge tax tips



Review your tax structure

Call us to discuss if your structure is right for you. This is often an effective tax planning tool.

Medical expense

Bring your receipts, medicare and private health fund tax reports if your out of pocket costs are greater than \$2,060.

Motor Vehicle

A 12 week log book may increase your refund if you don't drive a ute.

Monitor your PAYG Instalments

Common items for your consideration. Please tick if they apply to you.

Income:

- PAYG payment summary
- Government payments
- Pensions & annuities
- Interest and dividend income
- Managed fund trust distributions
- Business income and expenses (excluding GST if registered)
- Rental property income and expenses
- Sale of assets

General information required:

- Copy of last years income tax return (new clients only)
- Spouse details: name, birth date and taxable income
- Children: names and birth dates
- Private health insurance details
- Amount of child support paid
- Bank account details if you wish your refund to be deposited electronically

Expenses:

- Motor vehicle: estimate of work km's if less than 5000 km's, or a summary of actual costs if greater than 5000 km's
- Protective clothing or uniform
- Home office
 - Hours working from home
 - Internet
 - Home phone
- Work related
 - Tool replacement
 - Membership & subscriptions
 - Mobile phone
 - Computer equipment repair and replacement items
- Study
- Donations
- Accounting fee
- Investment costs

Please bring all tax statements, receipts and other documents that you believe may be relevant to your appointment. This will enable our team to prepare your tax return quickly, accurately and utilise your time effectively.

