



QUICKEST WAY TO ORGANISE YOUR TAX

Your Name: Your Spouse's Name:

EMAIL: Preferred Phone No:

Tick this box if you would NOT like to receive tax returns electronically

Address:

Name(s) and Birthdates(s) of Dependants:

Occupation:

Please advise of your bank account details for any potential tax refunds:

Bank Account Name:

Bank Account BSB: Account Number:

WDF | Our Services

- Business and personal taxation
- Business benchmarking
- Establish and administration of Self Managed Superannuation Funds
- Superannuation check up
- Business reviews and check ups
- Tax planning
- Business succession planning
- GST services
- Capital gains tax
- Estate planning and wills
- Fringe benefits tax
- Employment taxes
- International tax
- Structuring advice and implementation
- Cloud accounting
- Bookkeeping services



Business advisory



Self managed superannuation



Smart accounting



Tax + compliance



Bookkeeping + payroll

Please review the checklists below, compile the appropriate documentation and send to our office.

Income

- Dividend statements
- Annual tax statements from Managed Funds and Trusts
- Employee share scheme statements
- Centrelink payment summaries
- Superannuation, pension and lump sum payment summaries
- Interest received details including bank and account number

Note: Employment income is available to us via the ATO.



Rental Property Details

- Details of income received
- Expenses for:
 - Advertising
 - Body Corporate Fees
 - Cleaning
 - Council rates
 - Gardening
 - Interest
 - Insurance
 - Land tax
 - Management fees
 - Property improvements and replacements
 - Pest control expenses
 - Repairs & maintenance
 - Water rates



Deductions

- Home office expenses, hours worked from home to fulfil employment duties
- Work related car expenses, including vehicle log book or kilometres travelled
- Work related travel expenses
- Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses
- Work related self-education expenses
- Other work related expenses e.g. union fees, phone/internet expenses, printing, stationery, tools of trade, professional memberships/subscriptions etc
- Assets purchased for work use e.g. computers, laptops, iPads etc.
- Personal Superannuation Contributions
- Interest and/or dividend deductions
- Donations or gifts
- Tax agent fees
- Income protection insurance
- Investment expenses



Capital Gains Tax

Please provide purchase and sale documentation if you have:

- Disposed of a rental property or a holiday home
- Received property as a result of a divorce or death
- Purchased or disposed of cryptocurrency
- Purchased or disposed of shares or units in managed funds

Other Information Required

- Spouse super contributions
- Any other work related income and/or expenses not already listed