

TICK TAX TAX ACCOUNTANTS

- MOBILE** (We come to you) **SERVICE AVAILABLE** -
Daytime: Monday to Friday (Saturdays: July to Nov only)
Nights: Monday to Thursday (July to Nov only)
A mobile service fee of \$16.50 per appointment applies to this service.
- 18 and under Fee Free (No Charge)#***
- Taxable incomes of under \$6000 Fee Free #***
- 21 and under – Flat rate \$88 (INC GST)***
- Individual Returns from \$118 (INC GST)***
(for appointments in our Office)
Electronic Lodgement - Refunds usually within 14 days
- Fees can be deducted from refunds - an administration fee of \$27.50(inc.GST) applies for this service.^**
NOTE: WHERE NO REFUNDS ARE EXPECTED, THE FEE MUST BE PAID BEFORE THE RETURN IS LODGED.
- Partnership, Trust and Company returns (POA)**
- Estimate of refund/liability provided at the interview** (complex/technical issue returns excluded)
- Tax by Post** - simply post, fax or email your payment summary etc. to us - we then phone you and go through our check lists to ensure all income/claimable deductions are made.

- When accompanied by a fee paid tax return of residents of the same abode at the same appointment

* - Maximum preparation time of 30 minutes

^ - Conditions may apply to new clients

TICK TAX CHECKLIST - INCOME

(Tick if applicable)

- SALARY AND WAGES, FRINGE BENEFITS, LUMP SUM PAYMENTS** (Usually all shown on payment summary)
- ALLOWANCES** - Whether or not shown on your payment summary - benefits, earnings, tips, jury service, vehicle, meal, travel, site, dirt, phone allowances etc.
- EMPLOYMENT TERMINATION PAYMENTS** (ETP Summary)
- NEWSTART, SICKNESS OR OTHER GOVERNMENT BENEFITS**
(Usually a Payment summary from Centrelink)
- AUST. GOVERNMENT PENSIONS OR SIMILAR BENEFITS, OTHER NON-GOV'T AUSTRALIAN PENSIONS OR ANNUITIES** (Annual Statement from provider showing if / what UPP (Undeducted Purchase Price) is deductible, Tax Offset if applicable, C/link Payment Summary)
- INTEREST** (Bank - Credit Union books / statements - Cash Management Trust Annual Interest Statements)
- DIVIDENDS** (Dividend statements - usually 2 per year per company)
- INCOME FROM PARTNERSHIPS AND/OR TRUSTS** (Annual Distribution statements from Managed Funds, Investment / Unit Trusts Etc.)
- PERSONAL SERVICES INCOME AS A SOLE TRADER**
- CAPITAL GAINS OR LOSSES - ANY ASSETS DISPOSED OF ?** (Shares / Units, Real Estate, Collectables, Private Use Assets)
- FOREIGN SOURCE INCOME (INCLUDING FOREIGN PENSIONS,** (Bank Statements, Documentation from Pension provider)
- RENTAL INCOME** (date first rented, weeks rented this year etc.)
- OTHER INCOME** (please specify).....

TICK TAX CHECKLIST - DEDUCTIONS

(Tick if applicable)

- WORK RELATED CAR EXPENSE CLAIMS**
 - Cents Per Kilometre method (vehicle engine size <=1.6 Litre. or >2.6 Litre., how calculated ?)
 - One Third Actual expenses (receipts as per log book method)
 - Twelve Percent of vehicle cost (Purchase contract)
 - Log book method (all receipts for fuel,registration, insurance, tyres, repairs, RAA, opening adjusted value to calculate depreciation, log book kept for 12week period every 5 years to establish work to private percentage)
- OTHER WORK RELATED TRAVEL EXPENSES** (taxi, air fare, accommodation, meal etc. receipts)
- WORK RELATED UNIFORM AND OTHER CLOTHING EXPENSES** - (Laundry (up to \$150 without receipts), dry cleaning receipts)
- WORK RELATED SELF EDUCATION EXPENSES** (Student / Union fees, Travel,Text books, Stationery, Depreciation etc.)
- OTHER WORK RELATED EXPENSES**
- Seminar and Course fees, Travel etc. Home Office expenses, Computer and Software, Telephone/Mobile Phone, Internet Fees, Tools and Equipment, Depreciation, Sun Protection Subscriptions, Union Fees or Professional body fees, Safety Equipment, Briefcases, Text Books, Journals / Periodicals. Other.....
- LOW VALUE POOL DEDUCTIONS** (opening value, items to be added)
- INTEREST AND DIVIDEND DEDUCTIONS** (bank/loan statements)
- GIFTS AND DONATIONS (receipts) COST OF MANAGING TAX AFFAIRS** (Tax Agent Fees for previous years return, cost of travel to/from Agent)
- RENTAL PROPERTY** - We have a check list of over 200 items re what can/can't be depreciated, 20 point checklist.