

**1 JULY 2019  
to  
30 JUNE 2020  
TAX YEAR**

**NEW OFFICE ADDRESS  
82 Railway Street South  
Altona VIC 3018**



**DI GREGORIO**

## **Individual Tax Return Check List**

- Gather together your information and complete as much of the following checklist as you can. We do not require original documents, copies are sufficient.

### **Once completed:**

- Call us on (03) 9398 3122 to arrange an appointment, (remember to bring your checklist and documents with you).

or

- Mail the Tax Return Documentations and Checklist into us.

or

- Email all information to us at [admin@dgaccountants.com.au](mailto:admin@dgaccountants.com.au)



### Appointments available

- ☐ In office
- ☐ Zoom meeting
- ☐ No appointment required
- ☐ Email return
- ☐ Mail Return

Please list below any issues you wish to discuss during your appointment.

## 2020 Individual Income Tax Return

Please complete or provide information on as many of the questions below as possible. If you are unsure, your questions will be addressed at the final consultation.

Name (Mr/Mrs/Ms/Miss) \_\_\_\_\_

\_\_\_\_\_

Postal Address \_\_\_\_\_

\_\_\_\_\_

Home Address \_\_\_\_\_

\_\_\_\_\_

Telephone Home \_\_\_\_\_

Work \_\_\_\_\_

Mobile \_\_\_\_\_

Email \_\_\_\_\_

Occupation \_\_\_\_\_

Spouse details (if applicable) \_\_\_\_\_

The ATO requires bank account details for all refunds.

BSB \_\_\_\_\_ Account Number \_\_\_\_\_

Account Name \_\_\_\_\_

Signature \_\_\_\_\_

## Income *Please Provide Details or Documents for the following items that apply to you*

- ☐ Salary or wages PAYG Payment Summaries
  - ☐ Allowances, earnings, tips, etc not on Summaries
  - ☐ Lump sum payment PAYG Payment Summaries
  - ☐ Superannuation/Employer termination Payments ETP Summaries
  - ☐ Australian Government Allowances PAYG Payment Summaries
  - ☐ Australian Government Pensions PAYG Payment Summaries
  - ☐ Other Pension/Annuities PAYG Payment Summaries and Letter
  - ☐ Interest (either statements or written down)
  - ☐ Dividend payments received 1/7/2019 to 30/6/2020
  - ☐ Annual Tax Statements from Managed Funds
  - ☐ Partnership/Trust Income Statements
  - ☐ Business income and deductions
  - ☐ Net Capital Gains (include all Purchase and Sale documents)
  - ☐ Foreign Income distribution statements
  - ☐ Rent income and expenses (either statements or written down)
  - ☐ Bonuses from a life assurance or friendly Society policy statements
  - ☐ Any other income details (please specify)
- Any other information you may consider relevant?*

## Deduction *Please Provide Documents or Calculations*

- ☐ Work related car expenses (kilometers or log book and detailed expenses)
  - ☐ Work related travel expenses
  - ☐ Work related uniform and other clothing expenses
  - ☐ Work related self-education expenses
  - ☐ Work related tools and equipment purchases
  - ☐ Work related telephone, computer and internet usage
  - ☐ Union, registrations, subscriptions, membership fees
  - ☐ Interest and dividend deductions
  - ☐ Gifts or donations
  - ☐ Any other deductions (please specify)
- Any other information you may consider relevant?*

## Tax Offsets/Rebates

- ☐ Amount of Superannuation contributions on behalf of spouse
  - ☐ Annual Private Health Insurance Tax Statement
- Any other information you may consider relevant?*

## OTHER SERVICES OFFERED

### Self Managed Superannuation Funds

We provide a wide range of Self Managed Superannuation Funds Taxation Advice and assist with the following facets to help trustees adequately meet their responsibilities:

- Operating a Self Managed Superannuation Fund, including asset administration and management
- Preparation of all statutory documentation required
- Assistance with investment strategies and implementation
- External independent audits
- Formation and establishment

### Other Services

- Insurance
- Loans
- Legal

### Financial Planning

We have established a relationship with Money Coaches to provide you with a full and comprehensive Financial Planning Service.

Money Coaches have been providing Professional Financial Planning Advice and Solutions for over 35 years. They are certified Financial Planners who can provide you with advice in a range of Financial areas, whatever your current situation.

They are qualified to provide advice on:

Investments	Insurance
Superannuation	Centrelink
Income Streams	Aged Care
Estate Planning	Mortgage Solutions
Retirement Planning	Home Loans

\*Tom Karatzas & Frank Grosso of Money Coaches are Authorised Representative(s) of AMP Financial Planning Pty Ltd, ABN 89 051 208 327, AFS Licence No. 232706.



## DI GREGORIO

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