1 JULY 2019 to 30 JUNE 2020 TAX YEAR

NEW OFFICE ADDRESS 82 Railway Street South Altona VIC 3018



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:

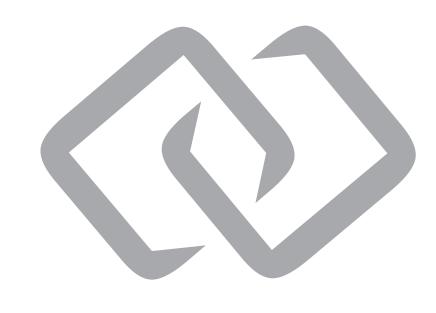
• Call us on (03) 9398 3122 to arrange an appointment, (remember to bring your checklist and documents with you).

or

• Mail the Tax Return Documentations and Checklist into us.

or

• Email all information to us at admin@dgaccountants.com.au



Appointments available	2020 Individual
In office	Income Tax Return
 Zoom meeting No appointment required Email return Mail 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
Please list below any issues you wish to discuss during your appointment.	Home Address
	Telephone Home
	Work
	Mobile
	Email
	Occupation
	Spouse details (if applicable)
	The ATO requires bank account details for all refunds.
	BSBAccount Number
	Account Name
	Signature

ncome	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

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- 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 Advise 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

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 Superannuation Income Streams Estate Planning Retirement Planning
- Insurance Centrelink Aged Care Mortgage Solutions 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.

Other Services

- Insurance
- Loans
- Legal



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