

## **New Clients**

### **List of Information to be brought in for the 1st Appointment**

- Your PAYG summary/Statement of Benefits
- Copy of previous years taxation return and assessment notice
- Fee paid to previous Tax Agent/Accountant
- Bank interest received (plus bank fees and charges for interest bearing accounts)
- Dividend notices from shares
- Expenses for current year ó a summary is preferred. E.g.
  - Motor vehicle expenses
  - Uniform/protective clothing
  - Self-education expenses
  - Other work expenses (union, associations, books, stationary etc.)
  - Medical expenses for the family (if over \$2,000)
  - Donations
  - Income Protections Insurance
- Tax File Number and Date of Birth of spouse, plus their income for the year in question
- Private Medical Insurance details (bring the Annual Membership statement showing membership no. and the number of days in the fund for the financial year)
- Dates of birth and names of children (for Education Tax Offset)
- Health Insurance details
- HELP debt/Financial Supplement Loan balance owing

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Revised 30.06.11