360 Wiz

Name: _____ Appointment: _____

Accountant: _____ Year Ended: _____

- ☐ INCOME
- ☐ PAYG summaries/lump sum payments/ETP statements/super pensions/Centrelink statements
- ☐ Investment income - Dividends, interest (bank/ATO), trusts, partnerships
- ☐ Property sale(s)
  - ☐ Purchase contract & settlement statement
  - ☐ Details of improvements & associated paperwork
  - ☐ Sale contract & settlement statement
- ☐ Share Sales
  - ☐ Purchase (Buy) & Sale (Sell) contract notes
- ☐ Investment property details:
  - ☐ Income
  - ☐ Agent statements & annual summary
  - ☐ Expenses: eg cleaning, rates, repairs, borrowing costs

- ☐ DEDUCTIONS:
  - ☐ Travel diary/car expenses
  - ☐ Accommodation & meals
  - ☐ Uniform & protective clothing
  - ☐ Books & reference materials & stationery
  - ☐ Subscriptions & memberships
  - ☐ Phone expenses
  - ☐ Home office expenses/ utilities (26c per hour)
  - ☐ Computer/laptop expenses
  - ☐ Internet expenses
  - ☐ Sun protection expenses for outdoor workers
  - ☐ Receipted gifts & donations over $2
- ☐ Superannuation Section 290-170 Notice (intention to claim a tax deduction)

- ☐ ADDITIONAL REQUIREMENTS:
  - ☐ Last year superannuation statement
  - ☐ Last personal insurance (income protection, TPD, trauma, life insurance) notice

- ☐ TAX OFFSETS/OTHER:
  - ☐ Details of out of pocket Medical, Dental, Optical, Pharmacy & Physiotherapy expenses if more than $1,500 in a year for the whole family.
  - ☐ Private health insurance statements/Medicare exemption certificate
  - ☐ Education Tax Refund — details of eligible education expenses
  - ☐ Names & date of birth of dependant spouse and children.

- ☐ NEW CLIENTS
  - ☐ Appointment of Tax Agent
  - ☐ Tax file numbers (including spouse) and last income tax return and assessment notice

Additional Items for Discussion: _____

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360 Financial VISION