

INFORMATION REQUIRED IN ADVANCE

Where possible, please provide any information relating to your tax return to us well in advance (at least 2 weeks) of your appointment such as:

- Annual Rental Summaries
- Buy & Sell Notes for Shares Sold
- Purchase and Sale Documents for Investment Properties Sold
- Profit & Loss Account for Purchases and Sales of Crypto Currencies / Bitcoin
- Employee Share Scheme Reports
- Finance Agreements for Vehicles / Equipment Purchased
- Acknowledgement Forms for Personal Deductible Super Contributions

FOR CLIENTS WITH SMALL BUSINESSES

Please provide file access to your MYOB / XERO / Quickbooks / Cash Flow Manager records OR business excel spreadsheets at least two weeks prior to your appointment.