

## INDIVIDUAL TAX CHECKLIST (wage & salary earner)

**Client Name:** .....

**Appointment date/time [Office only]:** .....

### Please complete before your appointment

#### Assessable Income:-

- ATO Income Statements (including Centrelink, Employee Share Schemes, Pensions & Child Support)
- Eligible termination payments
- Interest received
- Dividends received
- Trust distributions from investments
- Any assets sold that may generate a capital gain
- Details of any overseas income

N/A    Encl

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#### Allowable Employment Deductions - please bring proof of purchase:-

- Motor vehicle travel (either km travelled or log book)
- Other related travel including train fares and toll charges
- Uniform (logo's) purchased and/or protective clothing
- Self education expenses relating to your employment
- Union fees
- Meals – if you receive a meal allowance (this may not be detailed on your PAYG Summary, so LBW requires further evidence)
- Subscriptions, conference and seminars
- Tools purchased for work usage
- Home Office (please provide documented hours)
- Other work related expenses such as sun protection
- Donations
- Income protection/sickness and accident insurance
- Tax Agent fees for prior year (including Audit Insurance costs)

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#### Medicare Levy Related Items:-

- Your 2023 Private Health Statement

#### Personal Super Contributions:-

- Please provide Notice of Intent to Claim correspondence

#### Note:

- **LOW INCOME TAX OFFSET HAS BEEN REMOVED**

#### Other:

- BSB and Bank Account Number  
.....
- Number of dependent children at 30 June 2023:  
.....
- Please provide your address details:  
.....
- Please provide your Individual Email Address to update our system and to allow secure document signing:  
.....

# 2023 Income Tax Return

# 2023 Income Tax Return

[www.lbwadvisory.com.au](http://www.lbwadvisory.com.au)

Ph: (03) 5977 6210

- Complete the Checklist on the front side of this Envelope.
- Contact us on **5977 6210** to make an appointment or book online via our website. You will receive a reminder the day before your appointment date.
- If you have a **rental property** please contact us for a separate Checklist to help in the preparation of your Tax Return.
- Please note if all relevant information (including adding all receipt totals) is present at the initial appointment this will minimise our fees.

**Shop 3/4 Eramosa Road East  
Somerville**

## Consultation Fees

**Single Tax Return starting at \$185.00  
Double Tax Return starting at \$370.00**

### Appointments

In light of the COVID-19 pandemic, our preference is to minimise face-to-face appointments during the 2022/23 tax season. If you can complete your Tax Return(s) without a face-to-face appointment, please follow the "complete your tax return without a face-to-face-appointment" instructions below.

### Complete your Tax Return without a face-to-face appointment

If you can complete your Tax Return(s) without a face-to-face appointment, please either:-

- Drop your completed 2023 Income Tax Return Checklist Envelope along with any supporting documentation to our office.
- Refer to our website to complete the 2023 Income Tax Return Checklist online at [www.lbwadvisory.com.au/complete-tax-return-online](http://www.lbwadvisory.com.au/complete-tax-return-online)

We will schedule an appointment time as if you were coming into the office and let you know when to expect to hear from us.

### Peter Beckett

Daily appointments are available on Monday and Thursday.

Evening appointments are available Monday and Thursday (until 28<sup>th</sup> September 2023).

### Luke Wade

Daily appointments are available on Monday and Thursday.

Evening appointments are available on Monday (until 28<sup>th</sup> September 2023).

### Mathew Beckett

Daily appointments are available on Monday and Wednesday.

Evening appointments are available on Monday, Tuesday and Wednesday (until 28<sup>th</sup> September 2023).

### PLEASE NOTE:

**LBW POLICY REQUIRES FULL PAYMENT OF OUR FEES  
PRIOR TO LODGING YOUR INCOME TAX RETURN**