

Full Name:

Have your details changed since you last lodged a tax return? Yes No

If yes, please tell us what's new:

Address:

Email: Phone:

Occupation:

We now offer **digital signing via our MYOB Client Portal**. Would you like us to set one up for you?

Yes No I have a MYOB Client Portal and know that I can upload my documents electronically

Information NEM NT can access as Tax Agent

- | | |
|--|--|
| <input type="checkbox"/> PAYG Payment Summaries | <input type="checkbox"/> Dividends and managed fund distributions |
| <input type="checkbox"/> Superannuation income streams | <input type="checkbox"/> Private health insurance annual tax statement |
| <input type="checkbox"/> Interest on bank accounts | <input type="checkbox"/> Taxable Centrelink payments |

Information I have provided to NEM NT

Rental Property

- Annual rental statement or rental income
- Period your property was rented during the financial year
(and any private use)
- Interest on loans
- Rates and taxes
- Repairs and maintenance
- Body Corporate Fee
- Insurance (landlord & building)

Assets or Investments

- Purchase or sale of assets or investments during the year

Foreign income

- Details of foreign investments and income earned

Family Information

- Full name, date of birth & taxable income of spouse/de facto
(if married/de facto during the year, provide date this occurred)
- Full names and dates of birth of dependants

Deductions

- Motor vehicle (km's travelled OR all vehicle expenses and log book %)
- Uniform purchases and cleaning costs (occupation specific, logo or protective)
- Rapid Antigen Tests (RAT) required for work
- Work related self education expenses
- Work related seminar, subscriptions or travel expenses
- Home office purchases (computer, software, stationery)
- Number of hours worked from home
- Work related telephone & internet
- Union or professional fees
- Tools of trade (purchase or repair)
- Expenses relating to investment income
- Income protection insurance
- Donations made
- Personal superannuation contributions
(S290-170 acknowledgement notice provided)

Edwards Marshall Financial Solutions (EMFS)

Not only is EMFS able to provide you with a detailed financial plan for your future but it is also able to assist you with your income protection, life and total & permanent disability insurance needs.

- I would like EMFS to contact me.

Mortgage Choice Loan Review

Our in house finance specialists can review your current facilities for free to ensure you are receiving the best deal possible.

- I would like Smartline to contact me.