

Tax Memory Jogger bring to appointment or mail to me.

1st July 2015 to 30th June 2016.

Name-----Email-----@-----

Phone (H).....(W).....(Mob).....

.....**Bank a/c details for ATO refunds (check carefully or someone else will receive your refund!)**

BSB (6 figures).....a/c no.a/c name

PAYG certificates. I need these, however if you are missing any I am usually able to receive them from the ATO.

I obtain your Private Health Insurance Statement direct from the ATO, no need to include.

Income items (interest & dividends plus other income items shown on checklist)
For Managed Funds please attach the **“Annual Tax Summary”**

Work related expenses

Seminars, union, work clothes, books, travel etc. (I will include laundry & minor items)

Donations to approved charities (no raffle tickets!)

If you have dependent children please write number (names are not needed)

No need to complete this section if your spouse is a client

DOB of spouse -----/-----/ 19-----

Adjusted income of spouse \$----- (*Adjusted Income is taxable income + investment losses + reportable super + reportable fringe benefits amounts that **may** be shown on PAYG Summaries*)

Health expenses not available for 2016. Finished. Gone.

Notes

