

Why not use our handy checklist inside and follow these simple steps to get your 2013 Tax Return completed...

1. Run through checklist.
2. Make an appointment 8821 1033  
**OR**
3. Drop off your completed checklist AND original documentation.
4. Sign and arrange payment (cash and EFTPOS discounts available).
5. Returns lodged by us electronically.

## AT FEES YOU CAN AFFORD

We can often save you more than the cost of our fees alone. Our fees are also then tax deductible next year.



**Call 8821 1033 today**  
or email us at [tax@terrett.yorke.net.au](mailto:tax@terrett.yorke.net.au)

# WHY COME TO US?

Five reasons to use a Tax Agent to prepare your 2013 Tax Return...

1. **GET IT RIGHT.** Ensure your return is prepared correctly with up-to-date information.
2. **MINIMISE RISK.** With access to ATO data we can reduce the risk of omissions and a potential Tax Office Audit.
3. **MORE TIME TO PAY.** Being on a Tax Agent's lodgement list gives you automatic extensions to lodge and pay your ATO debts.
4. **FAST PROCESSING.** Lodging with us could mean your refund in your account as quickly as **14 days**. The ATO estimates Paper Returns to be **42 days**.
5. **CONVENIENCE.** In **under 1 hour** we could have your return ready to lodge.

## Terrett & Co.

15 Digby Street, KADINA  
**Phone: 8821 1033**

# TAKE THE **PAIN** OUT OF **TAX TIME**



## Terrett & Co.

Certified Practising Accountants 

15 Digby Street  
KADINA SA 5554  
**Phone: 8821 1033**

**Make an  
APPOINTMENT TODAY!**

# Terrett & Co.

## ANNUAL CHECKLIST

The following checklist shows the **required information** we will seek from you at our interview for processing your year end tax returns.

*(To our current clients, we may have retained some of these documents during the year, but please check to ensure that you bring in as much of the following information as you can.)*

Naturally if some items do not apply to you, please ignore.

**Name:** \_\_\_\_\_

**Mobile:** \_\_\_\_\_

**Email:** \_\_\_\_\_

### Information to bring:

#### Business items

- ☐ USB back-up of computerised bookkeeping or manual books.
- ☐ Bank/Credit Card statements for full year.

- ☐ Cheque books for full year.
- ☐ Details or any cash income or expenses.
- ☐ List Debtors and Creditors as at 30th June.
- ☐ Closing stock on hand as at 30th June.
- ☐ Copies of BAS/IAS statements for financial year.
- ☐ Employee wages paid for the year.
- ☐ Workcover reconciliation.

#### Individuals items

- ☐ PAYG Payment Summaries.
- ☐ Details of any payments from Centrelink
- ☐ Payment Summaries received from any superannuation pensions.
- ☐ Interest income details – some banks provide lists or interest summaries on request.
- ☐ Dividend income received (including details of franking credits). Include payment slips.
- ☐ Sale contracts for any shares sold. Note, we will also need the original purchase details if not provided.
- ☐ Details of any other investment income received by you, including rents and managed funds.

- ☐ Details of any personal superannuation contributions made.
- ☐ Private Health Insurance statement, regardless of how you claim, 30% Tax Offset.
- ☐ Work related travel expenses (details of distance travelled and type of car).
- ☐ Work related uniform expenses.
- ☐ Other work related expenses e.g. union fees, conference costs and home office running costs.
- ☐ Tax agent fees from previous year.
- ☐ Listing of medical expenses actually paid by you if the amount that your are “out-of-pocket” exceeds \$2120.
- ☐ Details of any donations made.
- ☐ If new to the firm, a copy of the previous years Notice of Assessment is required.
- ☐ Any other specific details for transactions during the year not listed above.