

## What to Bring to Your Appointment

### Same day refund information

- Photo ID ( current and not expired)
- PAYG summaries or other items (covering the whole 12 months)
- Zero balance ATO Tax Account (No Tax Debt)
- Must have lodged Previous Year Tax Return
- Must have received a **refund** assessment notice **AND** refund received must be equal to or more than the last years Tax assessment.
- Zero debt with Child Support Agency.
- FTB income estimate in line with that provided to Centrelink

### Fee Deducted from Refund

- PAYG summaries or other items (covering the whole 12 months)
- Zero balance ATO Tax Account (No Tax Debt)
- Must have lodged Previous Years Tax Return
- Must have received a **refund** assessment notice **AND** refund received must be equal to or more than the last years Tax assessment

### Fees Paid On the Day

- PAYG summaries and Original Income Statements covering the whole 12 months

### Amendments of Current Year Tax Returns

- Amendments of Current Year Tax Returns cannot be lodged until the original assessment has been processed by the ATO and all documentation is finalised.
- No Same Day Refunds on Amendments of Tax Returns.
- All Amendments of Returns must be paid for on the day.

## What to Bring to Your Appointment (continued)

### General Compliance Requirements

- ✓ Must have proof of work related expenses
- ✓ If the Log Book method for car use is to be used must have valid log book record
- ✓ If cents/km method to be used must have details of vehicle use, what for/when/kms per trip
- ✓ Receipts must be available for all deductions
- ✓ Client must sign Substantiation Declaration at completion of return
- ✓ Client must sign motor vehicle use declaration at completion if claiming deduction for car use.

### **NB**

In the initial interview prior to appointment if administration staff determine that there might be a problem with the client receiving their refund from the ATO, fees will be required to be paid before the return is processed.

EFTPOS or cash are acceptable in this situation.

