



HEXAGON TAX PROFESSIONALS

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Certified Practising Accountant and Certified Financial Planner



Dear client,

Winter 2012

Its Tax time Again!

Firstly, I like to remind you its tax time again and I would like to welcome you again to our "One Stop Financial Services". Being a CPA & CFP with 15 years experience, our practice will continue to strive to deliver the very highest level of service at competitive price. Hexagon Tax Professional's "tax checklist" is designed to capture all deductible expenses in order to maximize your tax refund and undeclared income, thus avoiding possible non deductible fines.

Thank you again for your valuable referrals they are much appreciated. Don't forget! You must lodge on time in order to avoid penalties of up to \$550 per tax year plus interest. Remember the sooner you see us, the sooner you receive your refund most importantly, the tax agent fee is 100% tax deductible. We are still getting refunds within 7 days avg (subject to ATO processing).

If you can't see us within our office hours then, you could also complete the attached basic tax checklist and send it back to us, together with your photocopied documents, by Post/Email, we will do the rest. Extra cost will apply.

Once again, I urge you to double check undeclared income such as: bank interest, PAYG, ABN, Social security etc as the ATO ramps up its focus on the Cash Economy by DATA matching information with banks, motor registry, social security and other Government agencies. If you have accidentally undeclared your past income, we can voluntary amend your past tax returns in order to lower the penalties. Make sure you keep all your receipts for at least 5 years if you have claimed over \$300. Also make sure you have a valid car logbook for your motor vehicle expense claim.

Documents or information you will need to bring with you:

Income:	<input type="checkbox"/> Bank Interest Dividend	<input type="checkbox"/> Business income	<input type="checkbox"/> ETP/Insurance/Lump sum
<input type="checkbox"/> PAYG summary (Salary)	<input type="checkbox"/> Rental property	<input type="checkbox"/> Investment/managed fund	<input type="checkbox"/> Foreign income/other
<input type="checkbox"/> Centrelink/Government	<input type="checkbox"/> Sale property/Shares	<input type="checkbox"/> Employee share scheme	<input type="checkbox"/> Super Pension
Deductions:	<input type="checkbox"/> Protective closing/shoes	<input type="checkbox"/> Stationery/diary/printing	<input type="checkbox"/> Membership/Subscriptions
<input type="checkbox"/> Car used for work	<input type="checkbox"/> Work-related self education	<input type="checkbox"/> Tools/Equipments/Computer	<input type="checkbox"/> Donations to charity
<input type="checkbox"/> Travel for work/toll/parking	<input type="checkbox"/> Work at home- electricity etc	<input type="checkbox"/> Conference/Seminars/Union	<input type="checkbox"/> Income protect insurance Tax
<input type="checkbox"/> Work uniform/laundry	<input type="checkbox"/> Reference books/journals	<input type="checkbox"/> Mobile/Telephone/Internet	<input type="checkbox"/> Agent fee , first aid training etc
Offsets:	<input type="checkbox"/> Family medical exp>\$2000	<input type="checkbox"/> Zone or overseas forces	<input type="checkbox"/> Spouse Superannuation
<input type="checkbox"/> Dependant Spouse/Parents	<input type="checkbox"/> Children Education expense	<input type="checkbox"/> Private health insurance	<input type="checkbox"/> Other.....
Other Services:	<input type="checkbox"/> Risk: Income & Life insurance	<input type="checkbox"/> Home Loan & Property gearing	
<input type="checkbox"/> Tax & Financial Planning	<input type="checkbox"/> SMSF Audit and Gearing	<input type="checkbox"/> Car Leasing & Buying	
<input type="checkbox"/> Salary packaging/sacrifice	<input type="checkbox"/> Super contributions	<input type="checkbox"/> Buying new property Referrals	

Exclusive offer available to our clients:

- Wholesale bank Term Deposit rates advisor fee from \$200 will apply. Retail rates no fee but commissions apply.
- Cash back, up to \$350 for every new or refinanced Home Loan completed by us. Bank rates start from 6.10% pa variable indicative rates (comparison 6.13%) as at 21/05/12, Nil application/settlement fee. Offer ends 30/06/12 or change anytime.
- Cash back \$100 for every New Car Business lease and buy (via Jivve) deals completed by us.

Sign up to our Free Monthly Electronic newsletter via our weblink: www.hexagontaxprofessionals.com.au

Bill Karraz CPA, B.Bus (Actg & Fin) tax agent/Principal/Financial Planner/Mortgage broker

Our business hours are 9am to 6pm Monday to Friday. Booking is advisable but not essential. Please call us for to make an appointment outside these hours especially Weekends, December- June in order to avoid any inconvenience.

Looking forward to seeing you again soon, Call us on 02 9386 9011

Bill Karraz CPA, CFP, JP, B. Bus (Actg, & Fin), NTAA, FIPA, - Principal

Limited Liability is the Accountants Scheme Pursuant to the NSW Professional Standards ACT 1994



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BASIC TAX MAIL QUESTIONNAIRE

Title (circle): Mrs / Miss / Ms / Mr / Dr

Name: Date of birth: Tax File Number:

if partnered spouse name: Date of birth: Taxable Income* :\$.

Residential address

Postal address:

Phone: Work: Home Mobile

Email:

Occupation: Bank: BSB..... Account No:..... A/c Name:.....

Dependant children (circle): Yes/No if yes, 1 age2 age3 age..... HECS-HELP or other HELP loan details: \$.....

INCOME: PAYG: no Dividend number: no Managed fund number: no.

Bank interest: total \$. Net Foreign Income:

Rental Income: No of property Other income:.....

DEDUCTIONS:

Vehicle expense: KM traveled..... Log book bus.....%. Petrol \$....., Rego, insurance

Travel expense eg : Toll/parking/travel for work \$.

Work related exp: (no receipts required if you are claiming under \$300 in total for items under this section)

Uniform, Laundry With logo or Occupational such as Chef, Nurses etc

Eg. Telephone, Stationery, Computer, Union fees, conference, internet, tools, First Aid Training etc.

Donations: Total \$. Tax agent Fees: \$. Income protections ins \$.

Other: Private health insurance: Yes/No if yes Please attach annual tax statement from the private health fund.

Medical Expenses net over \$2000 Y/N if yes list details or attach copy of statement \$.

Children Education Expense for Primary and Secondary children Y/N. if yes details of expenses

Other spouse, parent, etc rebate.

Please attach a copy of all documents applicable and mail them to 2/408 Oxford Street Bondi Junction NSW 2022 and a tax consultant will contact you soon.

Payment Details

Credit Card (circle) Master, Visa, Amex No: _____ Expiry ___ / ___ other.....

Cardholder's Name **Signature** **Amount: \$**.....

Bill Karraz CPA, CFP, JP, B. Bus (Actg, & Fin), NTAA, FIPA, - **Principal**

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