

What to Bring to Your Appointment

Same day refund information for 2010

- 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 2009 Tax Return
- Must have received a **refund** assessment notice **AND** refund received must be equal to or more than the 2009 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 2009 Tax Return
- Must have received a **refund** assessment notice **AND** refund received must be equal to or more than the 2009 Tax assessment

Fees Paid On the Day

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

Amendments of 2010 Tax Returns

- Amendments of 2010 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.

