

Tax Organiser - for the year ending 30/6/__

brealey quill kenny

CERTIFIED PRACTISING ACCOUNTANTS

Brealey Quill Kenny wants to help you efficiently organise your financial information prior to having your tax return prepared. We designed this envelope so you can record the relevant information on the cover and then store the supporting documents inside. It is a requirement that you retain your taxation records for at least 5 years.

For a more comprehensive summary of the information required to complete your returns please download the Tax Express form from the "Forms" section on our website www.bqk.com.au

Don't forget to bring (if applicable)	
PAYG Payment Summaries	
Dividend Statements	
Share Buy / Sell Documents	
Rental Annual Statements (see over)	
Managed Investment Fund Tax Statements	
Centrelink / FAO Information	
Education Expenses	
Partner / Spouse Income	
HELP Debt Information	
Private Health Statements	

Interest Received			
Date	Details	Received	TFN Tax Deducted
Total		\$	\$

Dividend / Distributions Received					
Date	Source	Unfranked Amount	Franked Amount	Imputation Credit	TFN Tax Deducted
Total		\$	\$	\$	\$

Tax Return Preparation | Taxation Advice | Tax Planning | Financial and Management Advice | GST and BAS Preparation | Bookkeeping | Business Advice | Strategic Planning and Development | Cashflow Preparation | Business Appraisals and Due Diligence | Insurance | Corporate Secretarial Services

Market City Commercial Centre Suite 6, Level 1(Cnr Bannister Road and South Street), 280 Bannister Road, CANNING VALE WA 6155 PO Box 1851, Canning Vale, WA 6970

Phone: 9256 2777

Fax: 9256 2766

Email: admin@bqk.com.au

Web: www.bqk.com.au

Clients Details			
Name		Phone Numbers	
Address		Email Address	

Rental Property Investment	
Address:	
Description:	Amount \$
Income:	
Rent Received	
Outgoings Reimbursed (eg. Excess water)	
Expenses:	
Advertising	
Agents Commission (Enclose Statements)	
Construction Costs (Depreciation Report)	
Garden Maintenance	
Inspection Fees	
Insurance	
Interest (Enclose Statements)	
Land Tax	
Shire Rates	
Strata Levies	
Water Rates	
Other:	

Motor Vehicle Expenses	
Make of Car:	
Business Use %	
Expenses (Total for Year)	Amount \$
Fuel	
Insurance	
Registration	
Services / Repairs	
Tyres	
Lease / Loan Repayments	
Loan Contract for New Vehicle	
Other:	

Notes / Issues to discuss with Accountant

Deductible Expenses	
Details:	Amount \$
Computer Expenses	
Donations	
Home Office Expenditure	
Income Protection Insurance	
Interest on Investment Loans	
Internet	
Mobile Phone	
Self Education Expenses	
Stationery and Incidentals	
Superannuation	
Tools	
Travel Expenses	
Uniform / Protective Clothing	
Union / Memberships	
Other:	