



BROADLEY & HAYDON

— CHARTERED ACCOUNTANTS —

ABN 32 691 683 140

AUSTRALIAN INCOME TAX RETURN

INFORMATION PACK

ABOUT US

We are a firm of Chartered Accountants who have been providing taxation and business services for over 40 years. We have offices in Orange, Condobolin & Lake Cargelligo. We are registered tax agents with the Australian Taxation Office, we can legally lodge your Income Tax Return to help you get back as much tax as possible.

WHAT WE OFFER

Broadley & Haydon Chartered Accountants taxation knowledge is extensive and we have many clients with different taxation obligations. Our approach is to be proactive with respect to all areas of taxation. Broadley & Haydon Chartered Accountants provide expert assistance for the lodgement of all tax returns.

DO YOU QUALIFY?

Have You Been In Australia Or Plan To Stay In Australia For 6 Months?

Then you qualify to be an Australian Resident for **INCOME TAX PURPOSES**.

HOW LONG DOES IT TAKE?

- \$** If you are lodging your income tax return for the current year and we have all your documents, your refund will take 7-14 days
- \$** If you are lodging your final income tax return (because you are leaving Australia), and we have all your documents, the process can take up to 6 weeks (The reason for this time frame is due to the fact that early requests from tax refunds are lodged by paper, and take longer to be processed by the tax office). If we have to chase any missing documents your refund may take longer.

HOW MUCH DOES IT COST?

A basic income tax return costs \$154.00. An additional fee of \$30 is applicable if you want your refund transferred into an overseas bank account.

16 Sale Street
PO Box 2527
ORANGE NSW 2800
Telephone: (02) 6362 2870
Facsimile: (02) 6361 1200
orange@bhca.com.au

2 Melrose Street
PO Box 73
CONDOBOLIN NSW 2877
Telephone: (02) 6895 2544
Facsimile: (02) 6361 1200
condo@bhca.com.au

13 Foster Street
PO Box 202
LAKE CARGELLIGO NSW 2672
Telephone: (02) 6898 1252
Facsimile: (02) 6361 1200
lake@bhca.com.au

Liability limited by a scheme approved under Professional Standards Legislation



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BASIC CHECKLIST – Individual Tax Returns

✓

- Personal Information form filled in.
- Authority Form filled in and signed.
- Fee Deduction form filled in and signed.
- Copies of all PAYG Payment Summaries/ Statement of Earnings/Final Payslips from your current/previous employers. These can be emailed to us.
- Any interest earned on bank accounts for whole year.
- All work related expenses paid during the year. eg work boots, tools
- Tax Return Fees paid last year if applicable. (so we can claim this year)

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Personal Information

Last Name First Names

Date of Birth (dd/mm/yyyy) / / Gender(please circle) Male Female

Tax File Number

Passport No Country of Issue

Date Departing Australia

Contact Telephone No Australian

Australian Mobile

Postal Details

AUSTRALIAN

Number Street Name

Suburb State/Province

Postcode/Zip

OVERSEAS

Number Street Name

Suburb State/Province

Postcode/Zip Country

Email Address

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Fee Deduction Authority Form

I,

of

hereby authorise Broadley & Haydon to immediately pay any Trust Money received by them on my account in respect to the engagement referred to below into a Trust Account, as defined by The Institute of Chartered Accountants in Australia By-Laws and Statements, operated by AG Broadley & Co Pty Limited with the National Australia Bank, 51 Bathurst St, Condobolin.

NATURE OF ENGAGEMENT

- (i) Preparation of 20_____ Income Tax Return \$_____
- (ii) Overseas bank transfer fee of \$30 (if applicable) \$_____
- (iii) Other \$_____

DEDUCTION OF FEES

I further authorise them in consideration of the completion of the engagement to deduct their fee(s) of \$_____ including GST in respect of the above engagement(s).

PLEASE ADVISE YOUR PREFERRED METHOD OF PAYMENT

1. Deposit into Australian Bank Account

BANK NAME.....

NAME OF ACCOUNT HOLDER.....

BSB ACCOUNT NUMBER

2. Deposit into Overseas Bank Account

BANK NAME.....

NAME OF ACCOUNT HOLDER.....

BSB (SORT CODE)..... ACCOUNT NUMBER

IBAN..... SWIFT CODE.....

3. Post a cheque to the address on file

ACCESS TO FILES (strike one out)

I authorise/decline to authorise The Institute of Chartered Accountants in Australia to use any information on such files or records for the purpose of its audit and quality assurance reviews.

LIMITATION OF AUTHORITY

This authority is strictly limited to the engagement referred to in the body of the document.

Signature..... / / 20



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Authority Form

I,

I hereby authorise the accounting firm of *BROADLEY & HAYDON* of 2 MELROSE STREET, CONDOBOLIN NSW 2877, to act on my behalf in the capacity of accountants and registered tax agents, to prepare and sign my personal income tax return based upon information provided by me for the year of income ended on 30/06/2009.

I, the above mentioned, also hereby authorise the accounting firm *BROADLEY & HAYDON* of 2 MELROSE STREET, CONDOBOLIN NSW 2877, to act on my behalf in the collection of lost documents (which includes, but not limited to), PAYG Summaries/Group Certificates, Pay slips, and other documents which in their capacity as accountants and registered tax agents, will allow them to correctly prepare and sign my personal income tax return for the year of income ended on 30/06/2009, based on the information I have provided to them.

I have understood the above, and agree to sign this document in the space below.

Signature..... / / 20

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