



2019 TAX CONFIRMATION OF ENGAGEMENT
 (Please bring with you to your appointment)

This form must be signed in order for your tax return to be lodged.

I hereby confirm the engagement of Jovic Accounting Pty Ltd to carry out the undermentioned:

SCOPE

Preparation and lodgement of 2019 Income Tax Returns and associated schedules. Electronic Lodgement service utilisation. Estimated Taxation Payable/Refundable statement.

It is understood that no audit has been carried out on the records provided. It is understood the assessment notice from the ATO will be emailed directly to me. Should there be any variation between that advised by Jovic Accounting and the assessment I receive I am able to contact Jovic Accounting to clarify.

Email Address _____

I am aware the ATO will now not issue cheques. All refunds must be direct deposited by the ATO. I wish for my refund (if applicable) to go to the following account:

Account Name: _____ Bank: _____

BSB: _____ Account No: _____

I also declare that Jovic Accounting Pty Ltd is permitted to lodge my Income Tax Return electronically on the basis that the original paper return signed by me will be held in the office of Jovic Accounting Pty Ltd for a period of not less than four years and be available for production to the Taxation Office on their request.

TERMS

It is agreed that the fees, as disclosed by Jovic Accounting Pty Ltd, will be paid prior to lodgement. Income tax returns will not be lodged until fees are paid in full either by cash, credit card or EFTPOS or arrangements to pay has been made, and that Jovic Accounting Pty Ltd has the right of lien over the records until full payment is made. I am aware that should I not pay I will be responsible for any account or debt collection fees.

Jovic Accounting
 is a CPA practice.



Name: _____

Signature: _____

Date: _____



Tax agent
 71458007



Liability Limited by a scheme
 approved under Professional
 Standards Legislation.

Head Office
 80 Pakington Street
 Geelong West, VIC 3218

Postal Address
 PO Box 8152
 Newtown VIC 3220

Melbourne Office
 Royal Domain Towers
 Level 14 / Suite 1410
 380 St Kilda Road Melbourne Vic 3000

p: 03 52226962 f: 03 52221477

admin@jovicaccounting.com.au
 www.jovicaccounting.com.au

COMPULSORY POST IN CHECKLIST

Please note "SAME AS LAST YEAR" will not be accepted please fill in the below and attach this to your documents this is due to increased ATO Audit Activity.

What is your Occupation _____

Number of Dependent Children _____

Do you have Hospital cover if so please provide statement from complying health fund.

Deductions

Work Related Car Expenses & logbook

To claim using the log book method you will need to provide the below and have a valid log book showing business and private use for 12 continuous weeks.

Start Odometer as at 1/7/18 _____

Finish Odometer as at 30/6/19 _____

Cost for motor vehicle

Petrol _____ Services _____ Tyres/Battery _____ Rego _____

Repairs _____ Insurance _____ Lease Payments _____ Interest _____

Other expenses _____

If you don't have a log book how many work related kms you have recorded for. You can claim up to a maximum of 5000KMs but will need written evidence if you become audited

KMS _____

Work Related Travel

Tolls _____ Parking _____ Taxi _____ Other _____

Meal, accommodation and incidental expenses incurred for overnight work

(Receipts needed) _____

Work Related Uniform – Logo, Safety or work specific (cannot claim laundry if not logo)

Laundry Y / N _____ Uniform Cost & Description _____

Dry-cleaning _____ Other _____

Other Work Related Deductions

Do you use your mobile for work if yes do you have a diary with 1 month documentation if so

How much per month \$ _____ Work related percentage _____

Do you use your internet for work if yes do you have a diary with 1 month documentation if so

How much per month \$ _____ Work related percentage _____

Do you work from home if yes how many hours per week _____

All other deductions please refer to our checklists



Client Details

PLEASE COMPLETE IF YOU ARE A NEW CLIENT OR YOUR DETAILS HAVE CHANGED SINCE 30 JUNE 2018

Full Name: _____

Date of Birth: _____

T.F.N: _____

A.B.N: _____

Spouse's Full Name: _____

Date of Birth: _____

T.F.N: _____

A.B.N: _____

Corporate Entity: _____

Trading Name: _____

T.F.N: _____

A.B.N: _____

Current Address: _____

Postal Address: _____

Phone Number: _____

Mobile Number: _____

Spouse Number: _____

Spouse Mobile: _____

Email Address: _____

Dependent Children

Full Name: _____

D.O.B: _____

Full Name: _____

D.O.B: _____

Full Name: _____

D.O.B: _____

Full Name: _____

D.O.B: _____

Bank Account Details

BSB: _____

Account Number: _____

Account Name: _____

Referred By

Income Items

- All PAYG Payment Summaries (i.e. group certificates)
- Details of any Allowances, Benefits, Earnings, Tips, Directors Fees, etc - *if you receive a meal or travel allowance please ensure your employer separately shows this on your PAYG Payment summary – no allowance shown potentially no claims as per ATO*
- Details of any bonuses from life insurance or income protection insurance payments.
- Consultancy or Contract Income plus related expenses
If registered for GST, please provide copies of your Business Activity Statements
- Details of any Lump Sum Payments
- Details of any Salary Package that is established and Fringe Benefits Tax information
- Eligible Termination Payment (ETP) Summaries / Statements
- Details of Government Allowances, Newstart Allowance, Parenting Payment or Pensions
- Pension or Annuity Statements
- Details of any Interest Earned on all bank accounts
- Dividend Statements from Shares
- Details of any Trust or Partnership Income
If you have received an income from a trust, syndicate or partnership we will need a copy of the annual tax statement you received from them.
- Capital Gains Issues from sales of shares, properties, other capital assets
If you have sold shares or property through the financial year please bring both the original purchase contracts and all sale contracts. If the shares were involved in a dividend reinvestment plan, please also bring all dividend statements.
- Foreign Sourced Income
- Asset Sales – Rental Properties, Shares etc.
You will need to bring with you the buying, selling and improvement costs of any asset you sold during the financial year.
- Rental Property Income and Expenses for Each Property (see checklist following)

Expense / Deduction Items

- Work Related Car Expenses & logbook
- Income Protection Insurance premiums
- Work Related Travel Expenses
Any travel for work errands, seminars or conferences including parking and tolls etc. - have allowance for ATO rates otherwise based on receipts you have
- Work Related Uniform, Occupation Specific, Protective Clothing, Laundry & Dry Cleaning - (must be logo clothing)
- Work Related Self-Education Expenses
TAFE fees, books, stationary, internet etc. for a course relating to your occupation.
- Other Work Related Expenses
Union fees, seminars, overtime meals, home office, tools, telephone, professional memberships, licenses or subscriptions, stationary, computer expenses, reference materials, sun protection, etc.

Expense / Deduction Items Continued

- Notice of Intent to claim deduction – personal super contributions
- Work related equipment purchases
Computers, calculators, brief cases etc.
- Interest & Dividend Deductions
- Gifts or Donations
School building funds, Child sponsorship etc.
- Cost of Managing Tax Affairs from previous year
Tax agent fees and number of kilometers travelled, other fees for professional taxation or accounting advice
- Details of Accounting or Taxation Advice Fees
- Tax deductible investments (e.g. agribusiness)

Other Information Required

- Family Tax Benefit received from Centrelink
- Details of any PAYG Instalments paid by you personally
- Details of spouse and their separate taxable income
- Details of any Superannuation Contributions made personally or for a spouse
- Private Health Insurance Details
- HELP or Student Financial Supplement Loan details

Work related expenses are still a big focus this year for the ATO

- **Please ensure you have all of your receipts you are claiming a tax deduction**
- **Remember these need to have a direct relationship with you earning your Employment income**
- **Keep your receipts for 5 years**



2019/20 TAX & BUSINESS PRICES

GEELONG OFFICE - 80 Pakington Street – Geelong West

Tax Return appointment:	\$225.00
Tax Return appointment with Renée:	\$350.00
Tax Return posted:	\$190.00
Student/Pensioner Tax Return:	\$150.00
Schedules (rental/cgt/etc):	\$120.00
Sole Trader Tax Return:	\$370.00
Partner (Renée) Hourly Rate:	\$350.00 per hour
Accountant Hourly Fee:	\$250.00 per hour
Administration:	\$140.00 per hour
No Show Fee:	\$160.00
Cancellation Fee of less than 24 hours:	\$160.00
Re- Pick up fee:	\$ 60.00
Ongoing Bookkeeping:	\$ 66.00 per hour
Bookkeeping:	\$115.00 per hour

MELBOURNE OFFICE - Suite 1410, 380 St Kilda Road – Melbourne

Tax Return appointment:	\$365.00 invoiced
Tax Return posted:	\$200.00 invoiced
Schedules (rental/cgt/etc):	\$140.00
Sole Trader Tax Return:	\$400.00
Partner (Renée) Hourly Rate:	\$385.00 per hour
Accountant Hourly Rate:	\$285.00 per hour
Administration:	\$150.00 per hour
No Show Fee:	\$250.00
Cancellation Fee of less than 24 hours:	\$250.00
Re- Pick up fee:	\$ 80.00

Due to our accountants travelling especially to the Melbourne office for appointments, times are limited and will only be booked to work with other appointments. If an appointment is cancelled and our office contacts you requiring you to change your appointment time, within reason, we ask that you please be flexible.

All fees quoted above are based on a client presenting organised information, particularly for income tax return processing.

Please note emails and telephone advice is billed on time at the accountant's discretion.

Please be aware that there are additional fees for requesting additional copies of documents, clients will be charged accordingly.

Please make all email contact to admin@jovicaccounting.com.au .

Due to a large amount of clients defaulting on payment, we appreciate you making payment on the day of your appointment unless otherwise organised with the accountant.

Please note that our payment terms for Individual Income Tax Returns posted or emailed is payment prior to lodgement.

We have the following payment options available – Cash, Cheque, Direct Transfer, EFTPOS Facilities. Please note that there is also a 1.2% surcharge on all credit card transactions.



Rental Property Checklist 2019

Please complete a separate form for each rental property.

Address: _____

Property Owned By: _____ Percentage: _____

Property Owned By: _____ Percentage: _____

Date Property first earned rental income: _____

Dates Rented: _____ Weekly Rental: _____

Number of Weeks Vacant: _____

Newly Acquired Properties

Purchase Price & Costs: _____ Purchase Date: _____

(Please provide copies of purchase contracts for our records)

Sale Price & Costs: _____ Sale Date: _____

(If you have sold this property please include details)

Please note that Stamp Duty is not a deductible item

Income

- Gross Rental Income \$ _____ (please provide agent annual statement)
- Other Rental Income \$ _____

Please provide Agent Rental Statement if applicable

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Advertising for tenant \$ _____ <input type="checkbox"/> Bank Charges \$ _____ <input type="checkbox"/> Body corporate fees \$ _____ <input type="checkbox"/> Borrowing expenses \$ _____ <input type="checkbox"/> Cleaning \$ _____ <input type="checkbox"/> Council rates \$ _____ <input type="checkbox"/> Capital allowance \$ _____ Depreciation on plant (Section 40) <input type="checkbox"/> Depreciation Report Yes / No
<i>Please email if available</i> <input type="checkbox"/> Gardening/lawn mowing \$ _____ <input type="checkbox"/> Insurance \$ _____ <input type="checkbox"/> Interest on loan(s) \$ _____ <input type="checkbox"/> Land tax \$ _____ <input type="checkbox"/> Legal fees \$ _____ | <ul style="list-style-type: none"> <input type="checkbox"/> Pest control \$ _____ <input type="checkbox"/> Property Agent fees/
Commission \$ _____ <input type="checkbox"/> Repairs & maintenance \$ _____ <input type="checkbox"/> Capital works deduction \$ _____
<i>(Section 43)</i> <input type="checkbox"/> Stationary, telephone
and postage \$ _____ <input type="checkbox"/> Water rates/charges \$ _____ <input type="checkbox"/> Sundry rental expenses \$ _____ <input type="checkbox"/> _____ \$ _____ <input type="checkbox"/> _____ \$ _____ <input type="checkbox"/> _____ \$ _____ <input type="checkbox"/> _____ \$ _____ |
|--|---|