Brien's Taxation Service

Dear Client,

On behalf of our team at Brien's Taxation Service we would like to welcome you to our firm. The documents enclosed include information about us and will prepare you for your up and coming appointment.

About Us

We are a family owned taxation and accounting business that has been operating for over 40 years. Our clients are our priority and we will work with you to assist with your financial and accounting needs to ensure we are looking after your financial future.

Over the years, we have achieved successful outcomes for our clients by building personal and life-long relationships and by providing timely financial advice and services. We take care of over 60 families that are now into their 2nd generation, proving loyalty and confidence in our team and our service offering at Brien's Taxation Service.

We are a small but experienced team committed to providing you with the personal service and attention you deserve. Our services include Income Tax Returns, Superannuation Services, Real Estate Services, Estate Planning, Financial and Management Accounting, Lending & Brokerage Services please refer to our website at www.brientax.com.au for details of all of our Financial Services.

Enclosed Information

1. Client Contact Information – to be completed prior or at your appointment
2. Income Tax Return Checklist – to be reviewed prior to your appointment

We look forward to seeing you at your appointment

Yours Sincerely,

Valerie Brien
Partner

Titian Sigle (nee Brien)
Partner

Brien's Taxation Service

Client Contact Information

Full Name	
Tax File Number	
Date of Birth	
ABN (if applicable)	
Address (home)	
Address (other) (Postal / Rental Property)	
Telephone Contacts	**Mobile:**
	Business Hours (work):
	After Hours (home):
Email	We like to touch base occasionally, but if you would prefer not to receive emails from us please tick here ☐
Main Occupation	
Spouse Name & Tax File Number	
Referred By	
NEW CLIENT AUTHORITY	**I authorise Brien's Taxation Service to act on my behalf and add me as a client with the ATO for all Taxation services.** **Client Signature** ______________________________

Services Required
(Tick all relevant services)

Taxation Return	**Individual**		**Superannuation Services**	
	Company		**Real Estate Services**	
	Trust		**Lending Services**	
	Partnership		**Financial Planning & Estate Planning**	
Set Up Services	**Self-managed Superannuation Fund**		**BAS / STP Preparation & Lodgement**	
	Company / Partnership		**Brokerage Services**	
	Trust			

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Income Tax Return Checklist

This is a handy checklist to help you collect together all of the receipts, tax invoices and documents you will need to bring with you to your appointment. For items indicated below with a #, if reported correctly and with your TFN to the ATO we can access on your behalf.

INCOME	# Payment Summaries		**EMPLOYMENT DEDUCTIONS**	Motor Vehicle / Travel Expenses	
	# Lump Sum & Termination Payment Summaries			Home Office Expenses	
	# Government Allowances & Payment Statements			Tools / Equipment / Asset purchases	
	# Bank Statements / Interest			Uniforms / Laundry	
	# Pension / Allowance Statements			Union Fees / Memberships / Registrations	
	# Share Dividend Statements / Contract Notes for buy/sell transactions			Self- Education & Professional Development (training / conferences / seminars / books)	
	Trust / Partnership Distribution Statements			Mobile Expenses	
	Capital Gains Statements (details of assets sold)			Other costs incurred earning income	
	Tax Statements from Fund Managers / Stockbrokers		**INVESTMENT DEDUCTIONS**	Interest / Fees on borrowing for investment purposes (bank / lender statements)	
	Foreign Sourced Income			Asset Purchases / Sale Agreements	
	Business Income			Investment Property – Body Corporate & Agent Fees / Rates / Land Tax / Water / Electricity / Cleaning / Repairs & Maintenance / Capital Works & Allowances / Insurance / Advertising	
	Rental Income				
	Employee Share Schemes		**OTHER DEDUCTIONS**	Tax Agent Fees	
	Other Income			Personal Superannuation Contributions	
OTHER INFORMATION	Prior Year Tax Return, Workpapers & Assessment			Donations to charities or building funds	
	Prior Year Tax Losses			Income Protection Insurance	
	# Government Debts (Child support / Centrelink)			Financing Lease Statements	
	Credit Card / Loan Statements		**OFFSETS**	# Private Health Insurance Statements	
				Superannuation Pension Rebates	
				Sole parent / spouse / housekeeper / low income	
				Spouse / Dependant Details	