

Tax Advisory Information Checklist

Please assess the list of information required below in order for us to provide you with a tax plan.

Reference	Item	Comments
1.	Income Please provide all current income/salaries and wages for you and your spouse.	
	Name	Gross Amount
2.	Expected Salary Please provide your expected salary for the next 5 years.	
	Financial Year	Gross Amount
3.	Expected Salary (Spouse) Please provide your spouse's expected salary for the next 5 years.	
	Financial Year	Gross Amount

Reference	Item	Comments
4.	Property #1 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
	Current rent you would receive per week if rented	
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	
	Percentage of ownership e.g. 50/50	
5.	Property #2 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
	Current rent you would receive per week if rented	
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	
	Percentage of ownership e.g. 50/50	
6.	Property #3 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
	Current rent you would receive per week if rented	
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	

Reference	Item	Comments
	Percentage of ownership e.g. 50/50	
7.	Property #4 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
	Current rent you would receive per week if rented	
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	
	Percentage of ownership e.g. 50/50	
8.	Property #5 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
	Current rent you would receive per week if rented	
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	
	Percentage of ownership e.g. 50/50	
9.	Property #6 Property Address:	
	Current market value of the property	
	Current loan balance	
	Current rate of interest charged on the property mortgage	
	Are you paying interest only or principal and interest?	
	Date of purchase	
	Purchase price	
Current rent you would receive per week if rented		

Reference	Item	Comments
	How much can you redraw on your property (if applicable)	
	Is the property an investment/owner occupied?	
	Percentage of ownership e.g. 50/50	
10.	Other Assets Please provide all other assets that you currently hold and their market value/s. Asset Name	Market Value
11.	Bank Accounts Please provide all current saving and investment accounts along with their balances: Account Name	Balance
12.	Other Investments Please provide information on all other investments that you currently have along with their balances. Investment Type	Balance

Reference	Item	Comments
13.	<p>Dependants</p> <p>Please provide the number of dependent children and their ages.</p> <p>Child Name</p>	Age
14.	<p>Other Income</p> <p>Please provide any other income you receive.</p>	
15.	<p>Living Expenses</p> <p>Please provide the total monthly expenses for living i.e. Rent, Groceries, Restaurants, Utilities, Sports And Leisure, Childcare & Schooling, Transportation, Clothing</p>	
16.	<p>Salary Sacrifice</p> <p>Please provide any salary sacrifice arrangements currently in place for you and your spouse.</p>	
17.	<p>Credit Cards</p> <p>Please provide the number of credit card/s held and their credit limits:</p> <p>Number of Cards</p>	Credit Limit

Reference	Item	Comments								
18.	Personal Loans Please list any personal loans and their balances e.g. Car Loan:									
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19.	Documents To Provide Please provide copies of the following documents: <ol style="list-style-type: none"> a. Most recent individual tax returns for you and your spouse; b. Most recent payment summaries of the same; c. Provide two copies of payslips for each person; d. Year end statements/reports from any of your existing super fund/s; and e. All other entity documents related to you and your spouse. 									

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