

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

Reference	Item	Comments
4.	<b>Property #1</b> <b>Property Address:</b>	
	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.	<b>Property #2</b> <b>Property Address:</b>	
	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.	<b>Property #3</b> <b>Property Address:</b>	
	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	
7.	<b>Property #4</b> <b>Property Address:</b>	
	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.	<b>Property #5</b> <b>Property Address:</b>	
	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.	<b>Property #6</b> <b>Property Address:</b>	
	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?	

Reference	Item	Comments
	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	
10.	<b>Other Assets</b> Please provide all other assets that you currently hold and their market value/s.	
	<b>Asset Name</b>	<b>Market Value</b>
11.	<b>Bank Accounts</b> Please provide all current saving and investment accounts along with their balances:	
	<b>Account Name</b>	<b>Balance</b>
12.	<b>Other Investments</b> Please provide information on all other investments that you currently have along with their balances.	
	<b>Investment Type</b>	<b>Balance</b>

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

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

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