



## Your Personal Tax Affairs

We don't simply "prepare" your personal tax return.

We aim to go above and beyond in the service that we provide to all our clients in order to ensure that every possible deduction and unique situation is considered with the aim to maximise your overall tax position.

In order for us to prepare your tax return, we simply require you to submit your details to us via our [online form](#). (One submission for each outstanding financial year).

If you are unsure of the answer to a particular question, you can leave it blank or even send through a note / question to us in that space (no fields are compulsory or limited in text).

This form will enable us to add you as our client with the ATO. Once added, we will be able to access most of your income information including any group certificates lodged by employers with the ATO, interest income information, and in most cases information on dividend and similar income. Generally, we would also be able to see your private health insurance information.

## Sole Traders and Contractors

You will be prompted for a list of your business income and expenses.

If you have an online bookkeeping file please select the "Invite Accountant" Option.

You might simply prefer to list your income and expenses to us in your online form submission.

Xero file accountant invitations:

[sarah@freshwatertaxation.com.au](mailto:sarah@freshwatertaxation.com.au)

MYOB, QuickBooks and all other software:

[enquiries@freshwatertaxation.com.au](mailto:enquiries@freshwatertaxation.com.au)

## Do the GST laws apply to me?

Not to worry, we will be reviewing your figures and situation as a whole and we will advise if we think you need to be registered and why this is / isn't the case.

## Own a Rental Property (or Air BNB)?

If you own a rental property, our form will prompt you for a summary of total rental income and all associated expenses including council rates, water rates, property agent fees, strata, repairs & maintenance, depreciation (if you had a depreciation report prepared), sundry, electricity, travel to see rental property, mortgage interest etc.

If you use a property agent, they will be able to provide you with a summary that summarises most of these costs (generally electricity, council rates and mortgage interest are not included in agent statements).

## What happens after I submit my information?

In conjunction with the information provided by to us the ATO, along with the information that you fill out on our form, we are then able to draft up your tax return and email it back to you for your review and ATO Lodgement approval.



Once happy with the return, you can then digitally sign your approved tax return for lodgement. We would at this point lodge the return with the ATO and confirm with you once lodged. If we have any queries during this process, we give you a call to discuss or email through a list of questions. If you disagree with the tax return that we have prepared for you, please email or phone us with your queries and concerns / requested changes.

Unless requested by a member of our team, generally speaking we do not need to physically cite invoices / receipts etc. Please ensure that you have these on hand in the event of an ATO audit. You are welcome to scan and attach anything to us that you would like us to view and save for you.

As we draft up your return, we will advise you if we feel there is a particular deduction that we think you are entitled to, that has not been included (so that we can include it in your return).

Once you have submitted this form to us, you will receive a note that we have received your submission and that we will be back to you either ASAP (if we have any queries or points to raise with you) - or otherwise we will respond to you with the exact date that you can expect a copy of your drafted up tax return for your review by email.

We ensure that the email to accompany your tax return details what tax position you are in and why, along with any further information that you will require.

[Our Personal Tax Return Submission Process](#) is fast and simple to make your life easy!

Submit your tax

## Help! I am not sure what I can claim or how to gather my tax summary for submission to Freshwater Taxation...

Our online tax return submission aims to cover all possible areas of deductions available.

We suggest that you list all claims for which you have receipts / evidence in your submission to us. We will be sure to review the totals that you send us and advise both if we feel you can claim more or if we feel you are claiming a deduction which might not be allowable.

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### FAQ:

- Not sure how Tax works?
- Not sure how GST works?
- Worried that you will miss something?
- Looking to start a new business? (For example: a Company or Sole Trader Business)
- Maybe you have a business already and are feeling confused?





[Download our free eBook](#) which covers the most commonly asked questions that we receive on a regular basis.

[Step through our checklist](#) to determine the best option for you.

[Book in a phone chat](#) with a member of our team

**Many thanks for taking the time to review the way that we do things!**

**Should you have any queries, don't hesitate to get in touch with us and if you haven't already be sure to review our price list available on our website!**

