

Hello

This is a checklist we've designed to enable us to complete your work as quickly and efficiently as we can, by ensuring we have all the information we need right in front of us. This also avoids delays with having to follow up on missing or incomplete information, as well as additional costs if we need to sift through receipts.

For this reason, we kindly ask that you gather **everything** together **before** you send or bring in your information to us (including ALL entities you may have, such as businesses, companies, trusts or superannuation funds). If we do not have everything we need, unfortunately we will be unable to start your work and you may incur additional fees.

We appreciate and thank you in advance for the valuable time taken to complete our checklist, in order for us to get you the best possible result for your tax return(s). We would also like to take this opportunity to thank you for choosing the team here at Paris Financial. We are certain you will find our staff very keen and helpful, and always willing to ensure your needs are looked after to the best of our abilities.

If this is your first time with Paris Financial we would like to thank you for choosing us we are sure you will not be disappointed! It would help us greatly to have a copy of your last lodged tax return to enable us to check for any items that should be carried forward.

Please remember that this checklist and its contents relate only to your **personal** tax and not that of your trust or company. We have separate checklists describing the information required for any other entities you may have.

If you do have any questions, please feel free to contact Administration. Our Admin team will be more than happy to assist you, and can be contacted on:

03 8393 1000, or alternatively, via email: admin@parisfinancial.com.au