Individual Tax Return Service & Pricing Acknowledgement

Our firm's recommended pricing for individual income tax returns is based on a standard individual tax return with employment income and ordinary deductions.

This pricing applies where the return is relatively straightforward and does not include additional schedules, complex income, business activity, investment activity, capital gains tax calculations, cryptocurrency, or additional tax advice.

Before we begin work on your income tax return, please review and acknowledge the following.

Standard Individual Income Tax Return

Standard individual income tax return: $220.00 including GST

Our standard individual income tax return service generally includes:

- salary and wages income
- PAYG income statements
- bank interest
- Medicare levy and private health insurance details
- standard work-related deductions
- basic tax return preparation and lodgment
- review of information provided to us
- basic questions directly related to completion of the return

Additional Schedules and Work

Additional fees apply where your income tax return includes additional schedules, more complex income, investment activity, business activity, or further review.

Our recommended additional pricing includes:

Item	Fee
Rental property schedule	$75.00 per property
Business schedule – see below ALL ACTIVE SOLE TRADERS QUOTED HOURLY	$99.00 per business schedule
Investments	$99.00
Cryptocurrency	$440.00
Capital gains tax — shares, ETFs or crypto, up to 5 disposals	$250.00 plus GST
Capital gains tax — shares, ETFs or crypto, up to 10 disposals	$750.00 plus GST
Capital gains tax — shares, ETFs or crypto, up to 20 disposals	$1,000.00 plus GST
Small business CGT concessions	Hourly rate
Complex CGT matters	Hourly rate
Tax hourly rate	$330.00 plus GST per hour

Business Schedule

This fee does not include actively trading 'Sole Traders' – all active sole traders will be quoted via written proposal based on the records and level of work required.

The business schedule fee applies to one simple business activity/contract & PSI where the client has completed the work and provided clear information.

If the business activity requires additional review, bookkeeping, reconciliation, reconstruction of records, active trading activity, or detailed calculations, additional fees may apply.

Investments

The investment fee generally applies where investment information is provided clearly, such as annual tax statements, dividend summaries, managed fund statements or similar.

Where calculations are required, or where investment information is incomplete or complex, additional fees may apply.

Cryptocurrency

The cryptocurrency fee includes the relevant crypto return work and Koinly subscription where applicable.

Cryptocurrency work is not discounted.

Capital Gains Tax

Capital gains tax work is charged separately where required.

This may include shares, ETFs, cryptocurrency disposals, investment property sales, business asset sales or other CGT events.

Complex CGT calculations, incomplete records, or matters not listed above may be charged at the tax hourly rate.

Additional Work

Additional fees may apply where your income tax return includes, or requires review of, any of the following:

- rental properties
- sole trader income or business income
- partnership or trust distributions
- dividends, managed funds, ETFs or investment income
- cryptocurrency, share trading or other trading activity
- capital gains tax events
- foreign income
- amended returns
- prior year or overdue tax returns
- motor vehicle claims requiring logbooks or detailed review
- home office claims requiring detailed calculations
- ATO correspondence, reviews or audits
- tax planning or advice outside preparation of the income tax return
- additional meetings, calls, or substantial follow-up work
- incomplete, unclear or disorganised records requiring additional time

Where additional work is required, we will let you know where practical before proceeding with that additional work.

Information Provided By You

Our work is prepared based on the information and documents provided to us, together with information available from the ATO where applicable.

You are responsible for ensuring that the information provided is complete, accurate and not misleading.

We may request further information, documents, or substantiation where required.

Substantiation

You must keep appropriate records and evidence to support any income, deductions, offsets or claims included in your tax return.

This may include receipts, invoices, bank statements, logbooks, diaries, loan statements, rental property records, investment statements, and other supporting documents.

Payment Prior to Lodgment

Our invoice is required to be paid before lodgment of your income tax return, unless otherwise agreed in writing.

Acknowledgement

By submitting this onboarding form, I acknowledge that:

- I have reviewed the firm's recommended pricing for individual income tax returns.
- I understand that the standard individual income tax return fee is $220.00 including GST.
- I understand that the standard fee applies only to relatively straightforward individual tax returns.
- I understand that additional fees may apply for rental properties, business schedules, investments, cryptocurrency, capital gains tax, prior year returns, amended returns, ATO correspondence, or additional advice.
- I understand that where my matter requires additional work, further fees may apply.
- I understand that my tax return will be prepared based on the information provided by me and information available from the ATO where applicable.
- I understand that I am responsible for keeping appropriate records and substantiation.
- I understand that the firm's invoice must be paid before lodgment, unless otherwise agreed in writing.