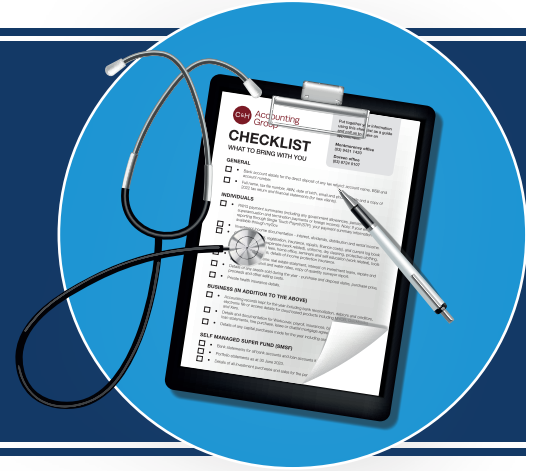


# Get your free Business & Financial health check



We specialise in family business, with a 30 year track record of providing our clients with highly personalised and expert accounting and taxation services.

Our local team of friendly and committed professionals at C & H Accounting Group offers a range of services to help you achieve your business and personal financial goals.

We specialise in providing advice and support to small and medium sized family businesses and preparing individual tax returns to ensure you claim your maximum refund.

Other services offered by C & H Accounting Group include:

- Taxation planning and advice
- Business consulting and reporting services
- Self Managed Super Funds
- Bookkeeping / BAS

**Contact us today to book your  
FREE business and financial  
health check!**

After hours appointments are available.



#### Montmorency office

14/39 Grand Boulevard, Montmorency Vic 3094



Phone: (03) 9431 1420

Email: [enquiries@chcpas.com.au](mailto:enquiries@chcpas.com.au)



The time has come to take control of your financial situation and start preparing for your future. With C & H Financial Planning Services, we offer tailored retirement and family financial planning services to our clients throughout Doreen, Montmorency and surrounding areas.

Work alongside our financial planner to take advantage of a wide range of financial planning services designed to meet your personal objectives.

We can advise on:

#### INDIVIDUALS

- Investment Strategies
- Retirement
- Tax and Estate Planning
- Family Budgeting

#### BUSINESS OF ALL SIZES

- Financial Planning
- Business Succession Planning
- Exit Strategies

Whether you're just starting out in your career or nearing retirement, we are equipped to help you put the necessary plans in place to work towards real financial freedom.

#### Doreen office

Level 1/100 Hazel Glen Drive, Doreen Vic 3754

Phone: (03) 8724 0107

Email: [doreen@chcpas.com.au](mailto:doreen@chcpas.com.au)

#### Important information

C & H Financial Planning is an Authorised Representative of Count Financial Limited ABN 19 001 974 625 Australian Financial Services Licence Holder Number 227232 ("Count Financial"). Count Wealth Accountants® is a trading name of Count Financial. Count Financial is 85% owned by Count Limited ABN 111 26 990 832 ("Count") of Level 8, 1 Chifley Square, Sydney 2000 NSW and 15% owned by Count Member Firm Pty Ltd ACN 633 983 490 of Level 8, 1 Chifley Square, Sydney 2000 NSW. Count is listed on the Australian Stock Exchange. Count Member Firm Pty Ltd is owned by Count Member Firm DT Pty Ltd ACN 633 956 073 which holds the assets under a discretionary trust for certain beneficiaries including potentially some corporate authorised representatives of Count Financial. Please note that any taxation and accounting services are not endorsed nor the responsibility of Count Financial Limited.

Member of





Put together your information using this checklist as a guide and call us to make an appointment.

**Montmorency office**  
(03) 9431 1420

**Doreen office**  
(03) 8724 0107

# 2025 CHECKLIST

## WHAT TO BRING WITH YOU

### GENERAL

- Bank account details for the direct deposit of any tax refund: account name, BSB and account number.
- Full name, tax file number, ABN, date of birth, email and phone details and a copy of 2024 tax return and financial statements (for new clients).

### INDIVIDUALS

- As your tax agent, we will have access to your PAYG statement from your employer, your private health fund details and interest and dividends earned.
- Investment income documentation - interest, dividends, distribution and rental income.
- Car expenses (fuel, registration, insurance, repairs, finance costs), and current log book if applicable, travel expenses (work related), uniforms, dry cleaning, protective clothing, mobile phone, union fees, home office, seminars and self education (work related), tools purchased, donations, details of income protection insurance.
- Investment deductions: real estate statement, interest on investment loans, repairs and maintenance, council and water rates, copy of quantity surveyor report.
- Details of any assets sold during the year - purchase and disposal dates, purchase price, proceeds and other selling costs.

### BUSINESS (IN ADDITION TO THE ABOVE)

- Accounting records kept for the year including bank reconciliation, debtors and creditors, electronic file or access details for cloud based products including MYOB, Quickbooks and Xero.
- Details and documentation for Workcover, payroll, insurances, bank statements, bank loan statements, hire purchase, lease or chattel mortgage agreements.
- Details of any capital purchases made for the year including associated finance contracts.

### SELF MANAGED SUPER FUND (SMSF)

- Bank statements for all bank accounts and loan accounts if applicable.
- Portfolio statements as at 30 June 2025.
- Details of all investment purchases and sales for the period from 1/7/2024 to 30/6/2025.