

 **21 July 2026**

Subject: It's Tax Time – Let's Get Started on Your 2026 Tax Return

Happy New Financial Year!

Thank you once again for the opportunity to prepare your tax return last year. Now that a few weeks have passed and the ATO's data-matching systems are up and running, we're ready to help you prepare and lodge your **2026 tax return**.

31 Booking an Appointment

You can book an appointment online by clicking the **"Book an Appointment"** link on our website:

 www.interactivetaxconsultants.com.au

Appointments are available for both **in-office** and **phone conferences**—simply choose your preferred day and time.

Prefer to speak to someone? Contact us directly:

 (02) 9212 1982

 reception@itc.sydney

One of our friendly team members will be happy to assist you.

Prefer Not to Book?

You're welcome to email your tax documents to **reception@itc.sydney**

Or post them to:

 PO Box 873, Edgecliff NSW 2027

What We Can Access on Your Behalf

As your registered tax agent, from mid-July we can access:

- PAYG Summaries
- Bank interest
- Share dividends
- Private health cover details

Note: Managed fund information usually becomes available in September.

Documents to Send Us – Financial Year Ended 30 June 2026

Please provide the following, if applicable:

Income & Investment

- Foreign income and foreign investment losses
- Interest paid on margin or investment loans
- Buy/sell contract notes for shares sold

Work-Related Expenses

- iPads, tablets, computers, software, mobile phone, internet
- Work-related apps, antivirus, stationery, home office supplies
- Total electricity cost per annum and work related %
- Seminar/conference fees including travel, accommodation, books & journals
- Union fees
- Tools, equipment, and protective clothing (incl. logo-branded items, sunscreen, hat, sunglasses)
- Income protection insurance
- First Aid training
- COVID-19-related items: face masks, hand sanitiser, tests
- Work-related briefcase or handbag
- Education expenses over \$250 (including related travel)
- Motor vehicle logbook or kilometres travelled (up to 5,000 km)

Rental Property Owners

- Rental income & annual statements
- Interest on investment loans
- Other related expenses

Visit www.interactivetaxconsultants.com.au for a detailed list and use our **Tax Depreciation Calculator** for an estimate of claimable depreciation.

Other

- Receipts for charitable donations
- Your **BSB and account number** (for a faster refund via direct deposit)

Need More Time to Lodge?

As a registered tax agent, we have access to **extended lodgement dates**—typically between **March and May 2027**.

Please contact our office to confirm your personalised due date.

We look forward to assisting you again this year.

If you have any questions, feel free to reach out—we're here to help



Adam Beasley
Principal Tax Agent