

Individual Income Tax Return

On-The-Spot Pricing



Prices effective: 1 July 2026 and are subject to change at any time. (inc GST)

Tax return preparation includes an interview with a CA or CPA qualified accountant for the items and limits specified below. All returns must be reviewed by a registered tax agent prior to submission to the ATO and we reserve the right to update or vary the returns (after discussion with yourself) where errors or compliance issues are detected.

		30 MINUTE APPOINTMENT		1 HOUR APPOINTMENT	
PRICED FROM		\$154	\$198	\$319	\$429
ITR Reference	Details	Base	Standard	Rental OR Mini Business Business T/O <10k	Sole Trader Business T/O 10k to 75k
Residency	Australian Resident Only	☒	☒	☒	☒
1, 2 & 3	Salary & Wages	☒	☒	☒	☒
5, 6 & 10	Government Payments, Bank Interest	☒	☒	☒	☒
D3 & D5	Uniform & Other Work-Related Deductions*	Up to \$300 Total	☒	☒	☒
D9 & D10	Donations & Tax Agent Fees	☒	☒	☒	☒
M1 & M2	Medicare Questions & Private Health Insurance	☒	☒	☒	☒
IT1 to IT8	Income Tests	☒	☒	☒	☒
A6	Spouse Details	☒	☒	☒	☒
HELP/HECS /SFSS	Calculations for HELP Debt Repayments	☒	☒	☒	☒
21 or P8/15	1 Rental OR Mini Business (T/O < 10K)	☐	☐	☒	☐
P8/15	1 Business (T/O 10K to 75K) Not GST Registered	☐	☐	☐	☒

Additional Fees and Charges

Section	Additional Incomes	Price
4, 7, 8 & 12	All other payment summaries (termination payments, annuities and superannuation income streams, superannuation lump sums & employee share schemes)(per payment summary)	+ \$10 each
11	ASX Dividends (per holding)	+ \$10 each

Section	Investment/Other Income	Price
9 & 14	Australian Personal Services Income (see Deductions for Deduction costs)	+ \$20 each
10 & 11	Private Interest & Dividends (non bank interest/non ASX dividend)	+ \$20 each
13	Partnership & Trusts – Per managed fund/ETF/Tax Statement (Tax statement provided)	+ \$20 each
24 & Other	Other Income (where statement supplied, no research/investigation required)	+ \$20 each

Section	Additional Deductions	Price
D1	Motor Vehicle – cents/km (where workpaper is provided)	+ \$10 each
D2	Work related travel claims (excluding truck drivers)	+ \$10 each
D5/D6	Depreciation including LVP (new items)	+ \$10 each
D4	Self-Education Claim (Per category)	+ \$10 each
D12	Personal Super Contribution (\$290 Confirmation provided)	+ \$10 each
D15	Income Protection Insurance (Letter provided)	+ \$10 each

Offsets

Section	Offsets	Price
T1 to T2	Offsets (Per offset)	+ \$10 each

T3 to T11	Offsets (Per offset)	 + \$20 each
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Income with Additional Requirements

Section	Foreign Incomes	Price
20	Foreign Income • Dividend or Interest (Per holding) • Pension (Per source) • +\$4 per item which requires conversion to AUD (foreign income must be reported at conversion rates on date of transaction)	+ \$20 each + \$20 each

Section	Capital Gains Transactions	Price
18	Capital Gains - Property • Investment/Mixed Use Property Sale • Main Residence Check	From + \$429 each + \$20 each
18	Capital Gains • Shares (Per Sell - Buy & Sell provided & matched by you) • Cryptocurrency (Koinly or similar report provided by you)	+ \$20 each + \$20 each

Section	Rental Properties	Price
21	Rental Schedule • Property manager/summarised by you • Foreign – as above, plus \$4 per AUD conversion	+ \$121/Rental

Deductions with Additional Requirements

Section	Complex Deductions	Price
D1	Motor Vehicle – cents/km (where google/other calculation required) Motor Vehicle – logbook method (where categorised and summarised by you)	+ \$40 each + \$40 each
D2	Work related travel – truck driver (where applicable allowance income)	+ \$40 each
D12	Personal Super Contribution (Where s290 assistance required)	+ \$40 each

Other Fees & Charges

Other Service	Item	Price
Division 293 Tax Estimate	Review of available superannuation contribution information on ATO and input into return for calculation	+ \$20
Excess Concessional Contribution Tax Estimate	Review of available superannuation contribution information on ATO and input into return for calculation	+ \$20
CGT Registry Entry	Entry into our CGT register for future capital gains	+ \$4 each
Foreign Conversion to AUD	Conversion of foreign amounts to AUD at date per ATO	+ \$4 each conversion

Sole Trader Business Income & Expenses

Section	Business Income	Price
P8	Business Schedule (no financial statements) <10k Summary Provided by you – Not GST Registered <75k Summary Provided by you – Not GST Registered - Not summarised or in inadequate format - GST Registered	+ \$121/business + \$231/business + Hourly rates + Hourly rates

Please note where the appointment is longer than the allotted time or the work required cannot be completed in the allotted time due to being non-summarised, complexity or scale, our hourly rates will apply so please ensure you are prepared for your interview/request and provide ALL relevant documentation summarised at that time, with information readily available for review in one email/submission/interview.

Hourly Rates

Where required, hourly rates apply.

Our fees are a result of the time taken to complete the task we have been engaged for, including;

- the application of our technical knowledge to your circumstances;
- meetings, discussions and advice on any queries;
- attendance to our compliance requirements; and
- the administration services, software and disbursements required to prepare and process your request.

Our current hourly charges (including GST), are as follows:

Professional

- Director/Registered Tax Agent **\$429 per hour**
- Chartered Accountant/CPA **\$297 per hour**
- Junior Accountant **\$132 per hour**
- Bookkeeper - Payroll Services **\$132 per hour**
- Bookkeeper - Standard Services **\$110 per hour**
- Administration Support **\$99 per hour**
- Disbursements **Cost plus GST**

All team members keep timesheets of their time spent on client engagements including processing documentation, formulating or attending to queries/meetings, communication via email, telephone or in person, research and investigation on matters specific to the engagement and the completion of our compliance requirements.

We also aim to ensure our fees are competitive by delegating activities to the most suited team member to complete the task at hand or offering a fixed fee under certain conditions. This means routine tasks can be performed by those with a lower hourly charge which allows for increased efficiency and cost effectiveness as well as allowing for client knowledge to be shared amongst the team.

Time Based Examples

As an idea on some time based entry costs, please refer to below.

Section	Business Income	Price
Bookkeeping/Calculations where not summarised (outside of appointment)	Per 5 minutes or part thereof	\$11 each
Any schedule not mentioned	Per 5 minutes or part thereof	\$25 each
Telephone attendance, discussion and advice, research/insufficient/missing information/non- summarised	Per 5 minutes or part thereof	\$25 each