



TAX RETURN **2025**

WELCOME TO LATITUDE ACCOUNTANTS! OUR GOAL IS TO PROVIDE YOU WITH THE BEST OUTCOMES FOR YOUR INDIVIDUAL TAX RETURN IN AN EFFICIENT AND TIMELY MANNER. WE HAVE STREAMLINED THE TAX RETURN PROCESS TO MAKE IT EASIER FOR OUR CLIENTS TO GET THE MOST OUT OF THEIR RETURN WITHOUT THE HEADACHE OF ANCIENT ACCOUNTING METHODS. WE ARE COMMITTED TO PROVIDING YOU WITH THE HIGHEST LEVEL OF SERVICE AND WE ARE ALWAYS AVAILABLE TO HELP YOU WITH YOUR TAX NEEDS.



INDIVIDUAL TAX RETURN

PROCESS

1

DATA COLLECTION

WE WILL PROVIDE YOU WITH OUR TAX RETURN CHECKLIST. OUR ONLINE CHECKLIST WILL ASSIST YOU WITH COLLATING YOUR TAX INFORMATION FOR THE YEAR.

5

LODGEMENT

WE WILL MAKE ANY FINAL CHANGES TO YOUR RETURN AND SEND IT TO YOU FOR YOUR ELECTRONIC SIGNATURE. ONCE SIGNED, WE WILL LODGE IT.

2

DRAFTING

WE DRAFT YOUR TAX RETURN WITH INFORMATION FROM YOUR CHECKLIST AND DATA PROVIDED BY THE ATO. WE REVIEW YOUR QUESTIONS AND PREPARE SOLUTIONS.

6

ASSESSMENT

YOUR TAX RETURN IS ASSESSED BY THE ATO. WE WILL REVIEW YOUR NOTICE OF ASSESSMENT AS PROVIDED BY THE ATO AND SEND IT TO YOU

3

INTERVIEW

WE CONDUCT A PHONE, ZOOM OR IN PERSON MEETING WITH YOU TO DISCUSS THE RETURN'S OUTCOME. THIS STAGE INCLUDES ID VERIFICATION.

7

FEEDBACK

WE ASK THAT YOU TAKE THIS OPPORTUNITY TO GIVE US FEEDBACK ON OUR SERVICE AND PROCESS. WE SEEK TO CONTINUALLY IMPROVE YOUR EXPERIENCE WITH US.

4

INVOICE

WE WILL REQUEST PAYMENT BY WAY OF ELECTRONIC TRANSFER OR BY CREDIT CARD. SOME CLIENTS MAY OPT FOR USE OF OUR TAX AGENT TRUST ACCOUNT.

8

IN BETWEEN RETURNS

PLEASE FEEL FREE TO CONTACT US IN BETWEEN TAX RETURNS. WE HAVE A RANGE OF TAX AND ACCOUNTING SERVICES THAT ARE AVAILABLE TO YOU.

TIME FRAME

WHILST WE ENDEAVOUR TO COMPLETE YOUR TAX RETURN QUICKLY, OUR FIRM HAS AN OBLIGATION TO ENSURE THAT OUR SERVICES ARE DELIVERED IN-LINE WITH THE HIGHEST PROFESSIONAL STANDARDS. AS A RESULT OF OUR APPROACH, IT WILL TAKE APPROXIMATELY 4 WEEKS FROM THE DATE YOU PROVIDE US WITH YOUR INFORMATION UNTIL YOUR TAX RETURN IS COMPLETE. IF THERE ARE ANY UNEXPECTED DELAYS, WE WILL CONTACT YOU. IF YOU HAVE NOT HEARD FROM US WITHIN THIS 4-WEEK TIME FRAME, PLEASE CONTACT US VIA EMAIL (info@latitudeaccountants.com.au) OR CALL 02 9890 9040.

