

GOLDPATS

RECORDS REQUIRED FROM CLIENTS FOR YEAR-END TAX/ACCOUNTING WORK FOR SUPERANNUATION FUNDS (Where applicable)

- Bank Statements for Super Funds
- Any buy and sell information in regards to shares or assets (property)
- Rental summaries
- Contributions
- Dividend Statements
- Annual Taxation statements from fund managers
- Insurance Details -
 - Insurance company
 - Policy No
 - Type of cover

NOTE: If you have had any changes to your contact details please provide us with the changes to enable us to update our data base.