

In this month's newsletter, we begin with a helpful checklist for reviewing your annual super statement, which you should be receiving shortly. Our animation illustrates some of the main points regarding a rather complex area of taxation, capital gains tax (CGT). Legislation recently passed pertaining to the low and middle income tax offset (LMITO); we explore this, and also offer budgeting/spending suggestions if you have received or are expecting to receive a tax refund. Interest rates are at a historic low; we discuss retirement in general, and also changes to the Age Pension deeming rates. Lastly, we leave you with a funny video, in which Jimmy Fallon talks to kids about what they think their parents do all day at work.

Super review checklist: Your annual super statement

As a super fund member, you will be receiving your annual super statement soon. In this article, we provide you with a helpful checklist for reviewing this important document.

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Capital gains tax (CGT) animation

When disposing of an asset, you may find that you make a capital gain or loss. If you do make a capital gain, tax is generally payable. In this animation, we illustrate capital gains tax (CGT).

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Tax refunds: Low and middle income tax offset (LMITO)

With a recently legislated Bill, many of us may have seen or are expecting to see a larger refund or smaller debt regarding our 2018-19 tax return. In this article, we explore LMITO, and tax refunds.

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Retirement and changes to the Age Pension deeming rates

Retirement income can often come from several sources. In this article, given the low interest rate environment, we discuss retirement in general, and also changes to the Age Pension deeming rates.

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Claiming deductions for work-related expenses

In the process of preparing your tax return? Any potentially claimable work-related expenses? In this funny video, Jimmy Fallon talks to kids about what they think their parents do all day at work.

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