



state  
trustees  
your interests at heart

## Here to help you with your tax



For over 70 years State Trustees has been caring for the personal and financial well-being of many Victorians.

At State Trustees we help build, manage and protect your assets with a comprehensive range of financial services. This holistic approach includes professional tax advice to help ensure you receive the maximum benefit from your tax return.

We are one of Victoria's largest tax agents and have the experience and know how to assist businesses as well as individuals. We prepare tax returns for all kinds of entities including companies, partnerships, superannuation funds and trusts. As accounting professionals our tax specialists also keep up with the latest in income tax rulings and legislation so that our advice is always relevant and up-to-date.

### Making tax time easier

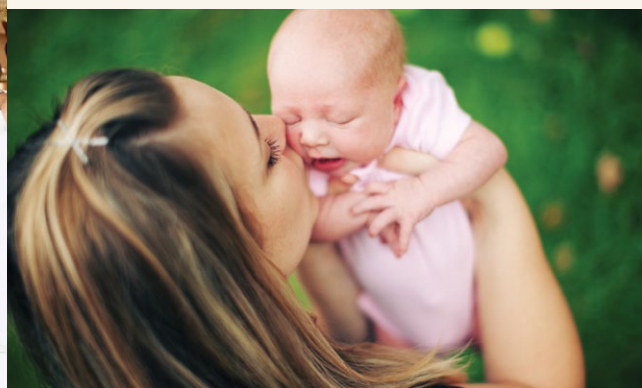
When your tax return is due our tax experts can make lodging as fast and simple as possible. We can also assist you throughout the whole year so when it comes to tax time you know where you stand – and there are no surprises. We can help you with:

- Preparing your tax return
- Business Activity Statements
- Capital Gains Tax
- Year-end tax planning
- Tax effective structures
- Tax effective investments
- Tax services for Executors
- Audits and Australian Tax Office disputes

As a registered tax agent State Trustees provides you with the convenience of extended lodgement periods. Our fast electronic lodgement also means you can have your tax refund quicker – within 14 days in many cases.

### Like to know more?

For assistance with preparing and lodging your tax return now or to make an appointment to start planning for next financial year call us on 9667 6215 (outside Melbourne 1800 133 095). Or visit [www.statetrustees.com.au](http://www.statetrustees.com.au) for more information.



# My Story

**“State Trustees worked out that I was eligible for tax offsets I had never even heard of.”**

When her tax was due, Mary decided it was time to get some professional advice. So she contacted State Trustees and made an appointment to see one of our tax experts.

When Mary came in we found out she has two children, Steven in primary school and Kate in secondary school. Mary also told us she was receiving Family Tax Benefit Part A.

As well as helping Mary lodge her tax return, State Trustees was able to help her plan for her next return. We advised her that in her situation she could be eligible for an offset of up to \$1,125 for expenses associated with her children’s education.

We showed Mary how to keep records of her children’s schooling-based expenses so she could claim them next financial year and she is looking forward to having the extra money to spend on the family.

\*The case study, while fictional, is based on real customer experience. Names and identities of persons and facts have been changed in order to protect confidentiality. Any similarity between a person’s name to the scenario described in the case study is unintended and coincidental.

## Questions?

Call State Trustees

**03 9667 6466**

Residents outside the Melbourne metropolitan area can call

**1300 138 672**

or visit

[www.statetrustees.com.au](http://www.statetrustees.com.au)

