

Ursula's Tax and Money Tips Checklist



This Week:



- ✓ Review & cancel unused subscriptions – **Ursula saved \$75/month!**
- ✓ Download ATO app & myGovID app
- ✓ Track work-from-home hours
- ✓ Take photos of work expenses receipts
- ✓ Check PHI, Child Care Subsidy, PAYG Withholding



This Month:

- 🕒 Use AI for loan/HECS calculations
- ✓ Review employer insurance (Life, TPD, Income Protection)
- ✓ Check employee benefits programs **Ursula saved \$3,803!**
- ✓ Do a 5-Step Super Health Check [▶ ATO Super Health Check | Superannuation calculator for retirement](#)



Before June 30:

- ✓ Consider making extra Super contributions
- ✓ Spouse Super Contribution (up to \$540 offset)
- ✓ Gov't Co-Contribution (Earn under \$62,488)
- ✓ Pay HECS debt early before indexation
- ✓ Check fees across all accounts and review subscriptions
- ✓ Check your Credit Score and Credit Report!



Get Financially Fit!

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