

AUSTRALIAN SHARE PLAN REPORTING

WE CAN HELP!

The deadlines for Australian Share Plan Reporting are approaching. Last year, the Australian Taxation Office (ATO) fundamentally changed the Australian Share Plan reporting process. Fortunately, this year the ATO has indicated there should be no further changes. We can assist you with meeting the deadlines using our specially designed upload tool.

Full Service

We can:

- prepare necessary calculations, including for mobile employees;
- produce Employee Share Scheme (ESS) Statements for you to distribute to employees;
- produce ATO Annual Report and lodge it with the ATO;
- prepare standard communication to employees explaining ESS Statement; and
- prepare individual calculation spreadsheet for each employee.

Our fee will vary depending on the number of employees, types of ESS interests and services required.

Lodgement Service¹

We can:

- provide you with an ESS Reporting Spreadsheet for you to populate with accurate and complete information;
- produce ESS Statements for you to email to employees; and
- produce the ATO Annual Report and lodge it with the ATO.

Flat Fee: US \$1,200²

Employee ESS Statements due:
14 July 2017

ATO ESS Annual Report due:
14 August 2017

CONTACT US



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¹ Non-Australian companies with no Australian Business Number are not able to use the ATO's online form for 50 employees or less. Such companies and all companies with more than 50 employees have to prepare and lodge the ATO Annual Report using special software (such as the software Baker McKenzie has developed.)

² Subject to terms and conditions, including that populated spreadsheet is accurate and complete. Any additional work required will be quoted for and will attract hourly rates.