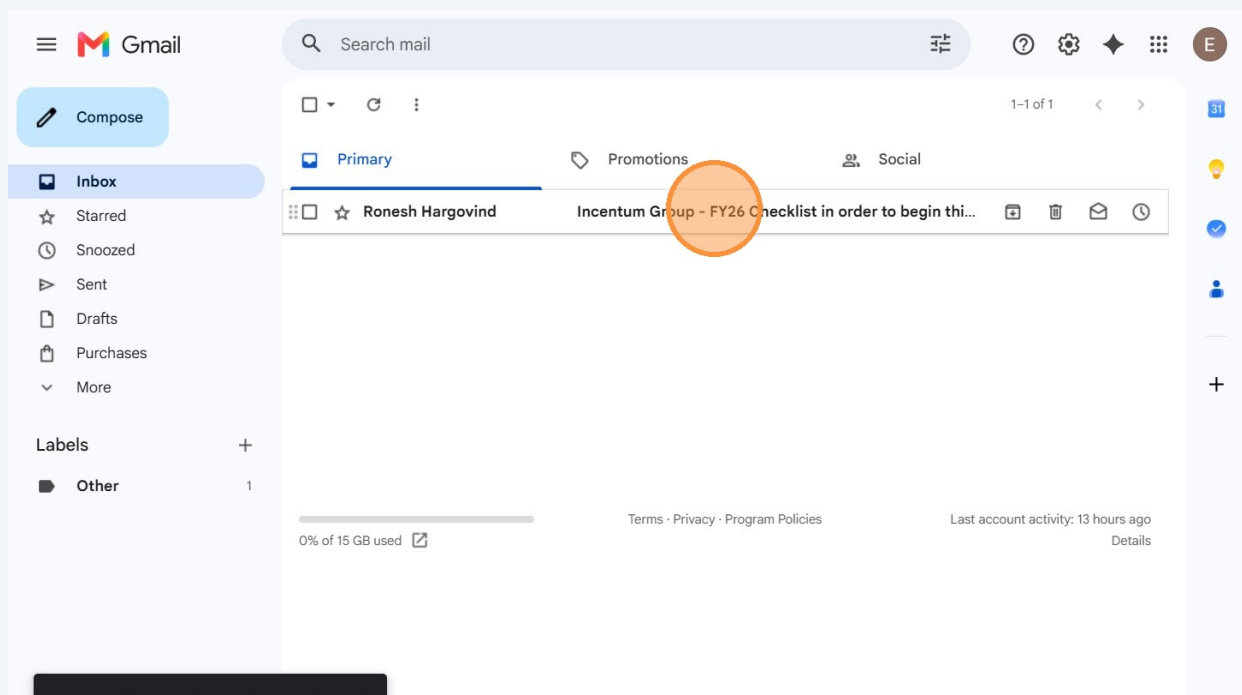


# Completing Your FY26 Quick Pre-check Portal Checklist

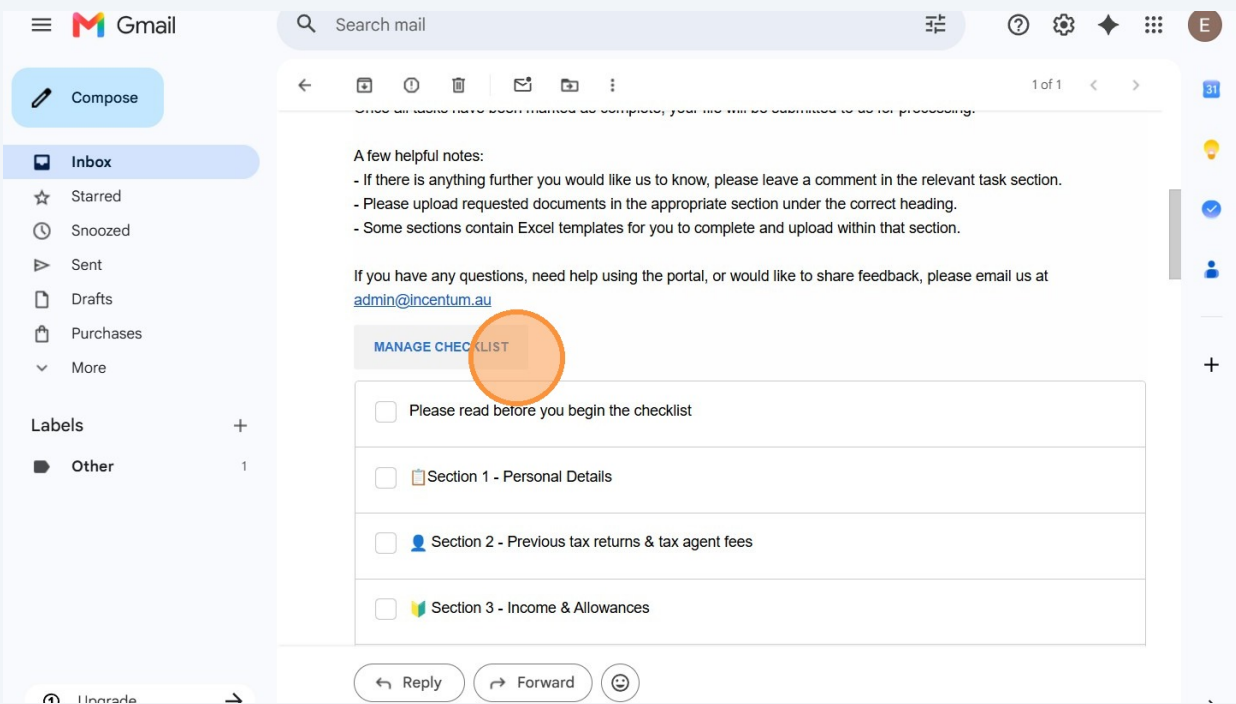
Learn how to navigate the Incentum client portal to provide requested documentation and verify personal details before we start your tax return. This guide helps you efficiently update your status, upload files, and complete your individual tax pre-check tasks.

## Accessing the Checklist

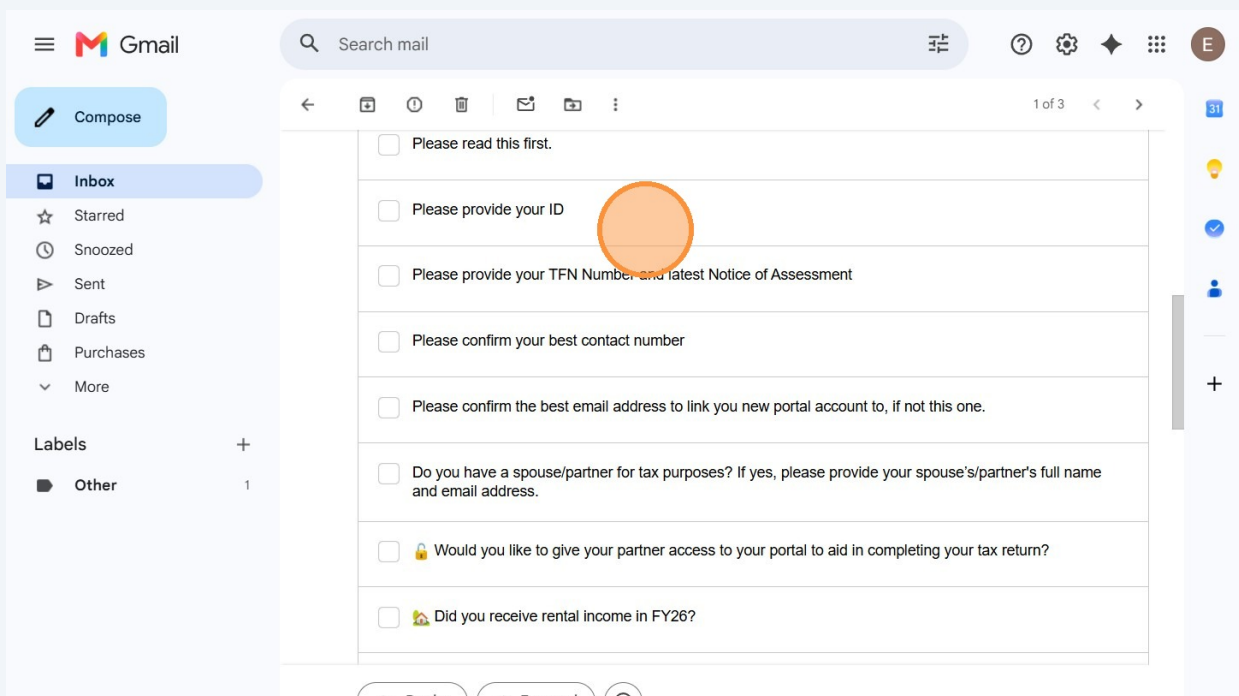
### 1 Open the Incentum Group checklist email



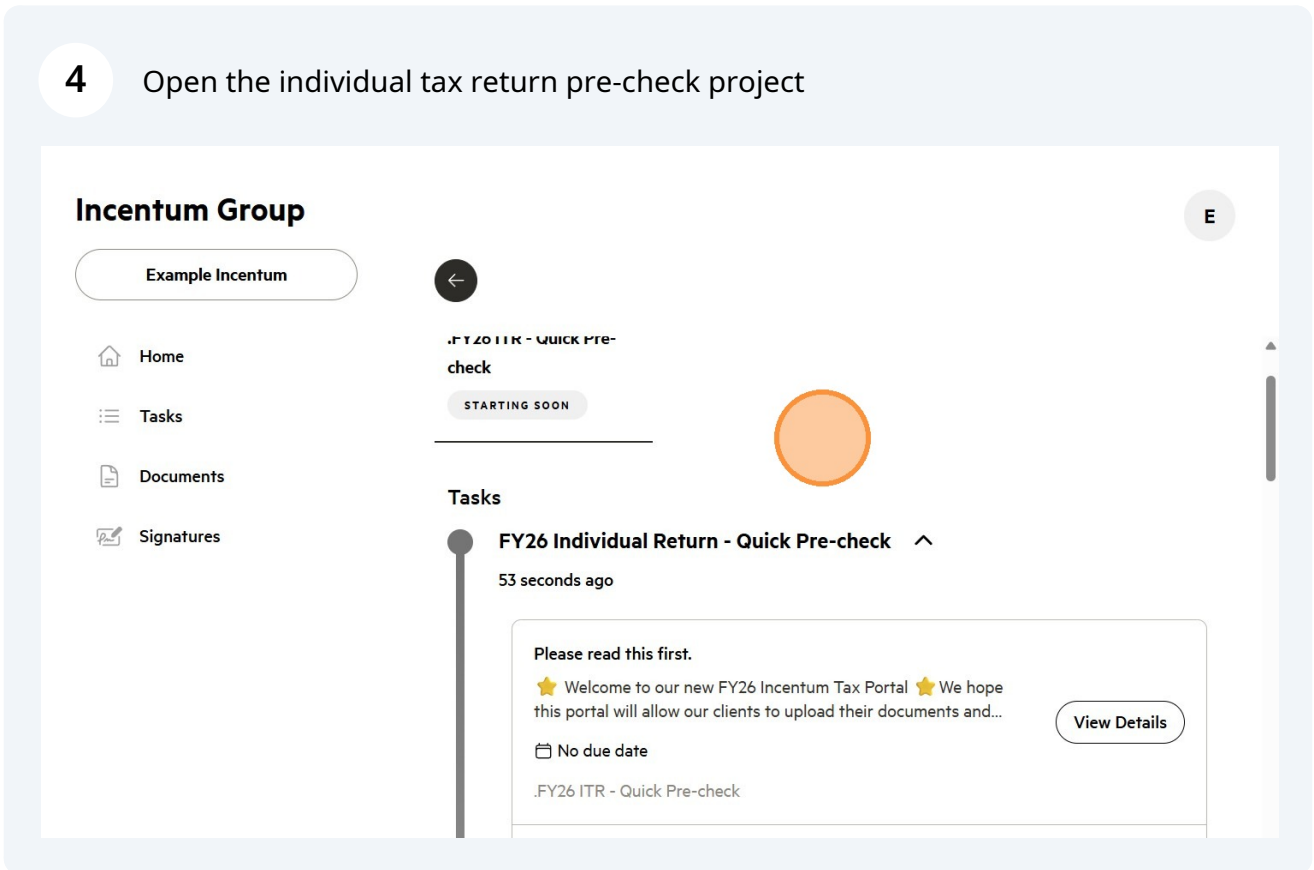
## 2 Click "MANAGE CHECKLIST" to open the client portal



## 3 OR Select the specific checklist task within the email body

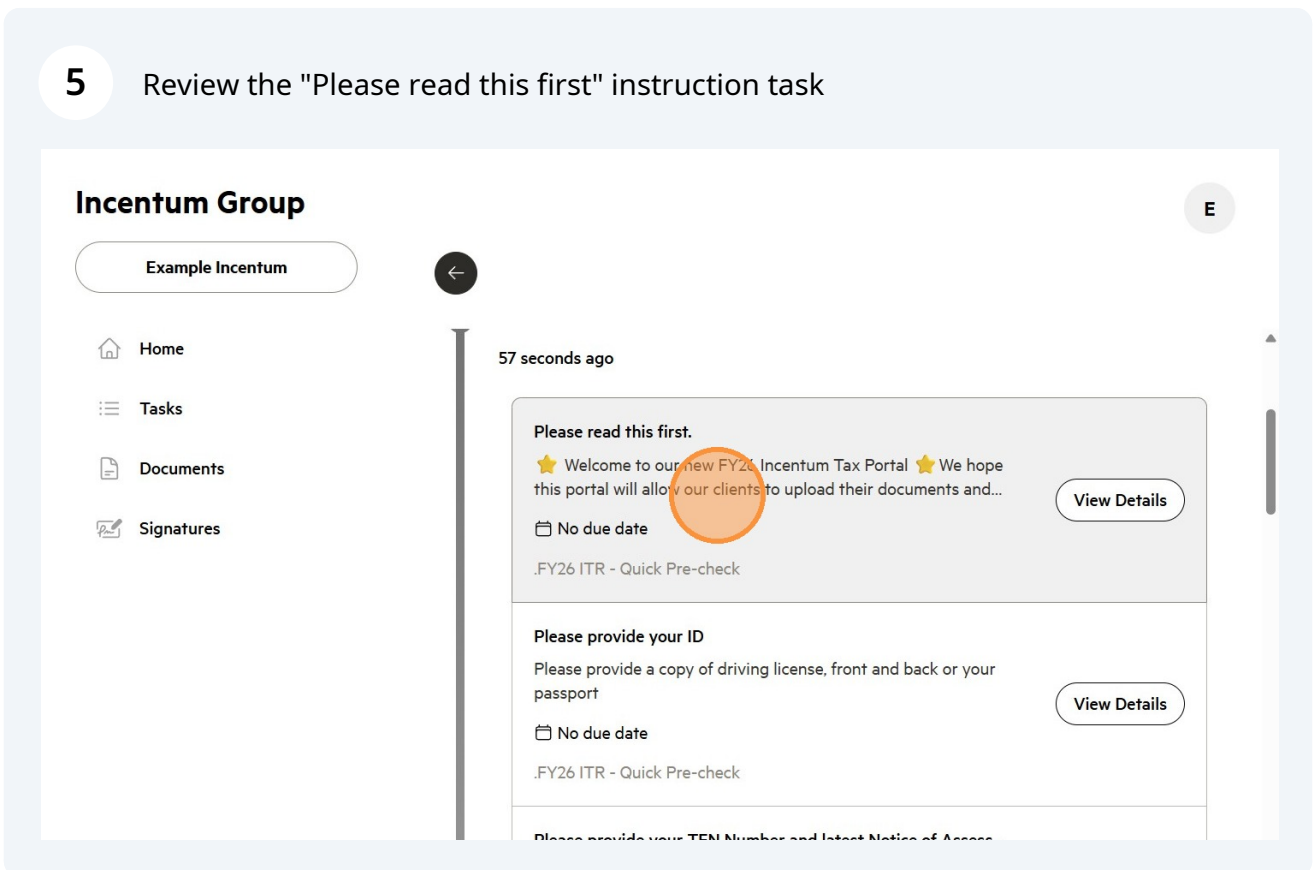


## 4 Open the individual tax return pre-check project



## Initial Review

## 5 Review the "Please read this first" instruction task



## 6 Click "Mark Complete" for the instruction task

### Incentum Group

Example Incentum

Home

Tasks

Documents

Signatures



If you run into any issues please email [admin@incentum.au](mailto:admin@incentum.au) and we will be more than happy to help.

So click 'mark as complete' and LET'S GO!!

Mark Complete

Messages

Documents

Collaborators



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Sheri Cohen changed the status to Sent to Client 1 minute ago

+ Comment

+ Upload document

E

## Personal Information Verification

7 Select the "Please provide your ID" task - if this has been sent to you

## Incentum Group

Example Incentum

- Home
- Tasks
- Documents
- Signatures

Please read this first.

★ Welcome to our new FY26 Incentum Tax Portal ★ We hope this portal will allow our clients to upload their documents and give all necessary information we require to...

Completed 9 seconds ago

.FY26 ITR - Quick Pre-check

Please provide your ID

Please provide a copy of driving license, front and back or your passport

No due date

.FY26 ITR - Quick Pre-check

View Details

Please provide your TFN Number and latest Notice of Assess...

Please either provide your latest Notice of Assessment assuring that the TFN has not be blanked out or provide just your TFN

No due date

.FY26 ITR - Quick Pre-check

View Details

8 Click "Upload document" to attach your identification and then click mark as complete

## Incentum Group

Example Incentum

- Home
- Tasks
- Documents
- Signatures

No due date

Please provide a copy of driving license, front and back or your passport

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 6 minutes ago



Sheri Cohen changed the status to Sent to Client 2 minutes ago

+ Comment

+ Upload document

9

Click "Upload document" to attach your identification and then click mark as complete

### Incentum Group

The screenshot shows the Incentum Group interface. On the left is a navigation menu with 'Home', 'Tasks', 'Documents', and 'Signatures'. The main area displays a task titled 'Example Incentum' with a 'No due date' icon and the instruction 'Please provide a copy of driving license, front and back or your passport'. A 'Mark Complete' button is visible. Below the task are tabs for 'Messages', 'Documents', and 'Collaborators'. Two messages from Sheri Cohen are shown, both stating 'Sheri Cohen changed the status to Sent to Client'. At the bottom, there are buttons for '+ Comment' and '+ Upload document', with the latter highlighted by an orange circle.

10

Open the task to confirm your contact number

### Incentum Group

The screenshot shows the Incentum Group interface with a task titled 'Example Incentum'. The task description is 'Please either provide your latest Notice of Assessment assuring that the TFN has not be blanked out or provide just your TFN'. Below this is a 'No due date' icon and the text '.FY26 ITR - Quick Pre-check'. A 'View Details' button is present. The task is expanded to show a sub-task: 'Please confirm your best contact number'. The sub-task description is 'Please provide your current mobile number'. It also has a 'No due date' icon, the text '.FY26 ITR - Quick Pre-check', and a 'View Details' button. The 'View Details' button for the sub-task is highlighted with an orange circle. Another sub-task is partially visible below: 'Please confirm the best email address to link you new portal a...'. It has a 'No due date' icon, the text '.FY26 ITR - Quick Pre-check', and a 'View Details' button.

11 Submit your current mobile number by adding a comment and then click send.

## Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures

No due date

Please provide your current mobile number

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 6 minutes ago



Sheri Cohen changed the status to Sent to Client 2 minutes ago

+ Comment

+ Upload document

## Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures

No due date

Please provide your current mobile number

Mark Complete

Messages Documents Collaborators

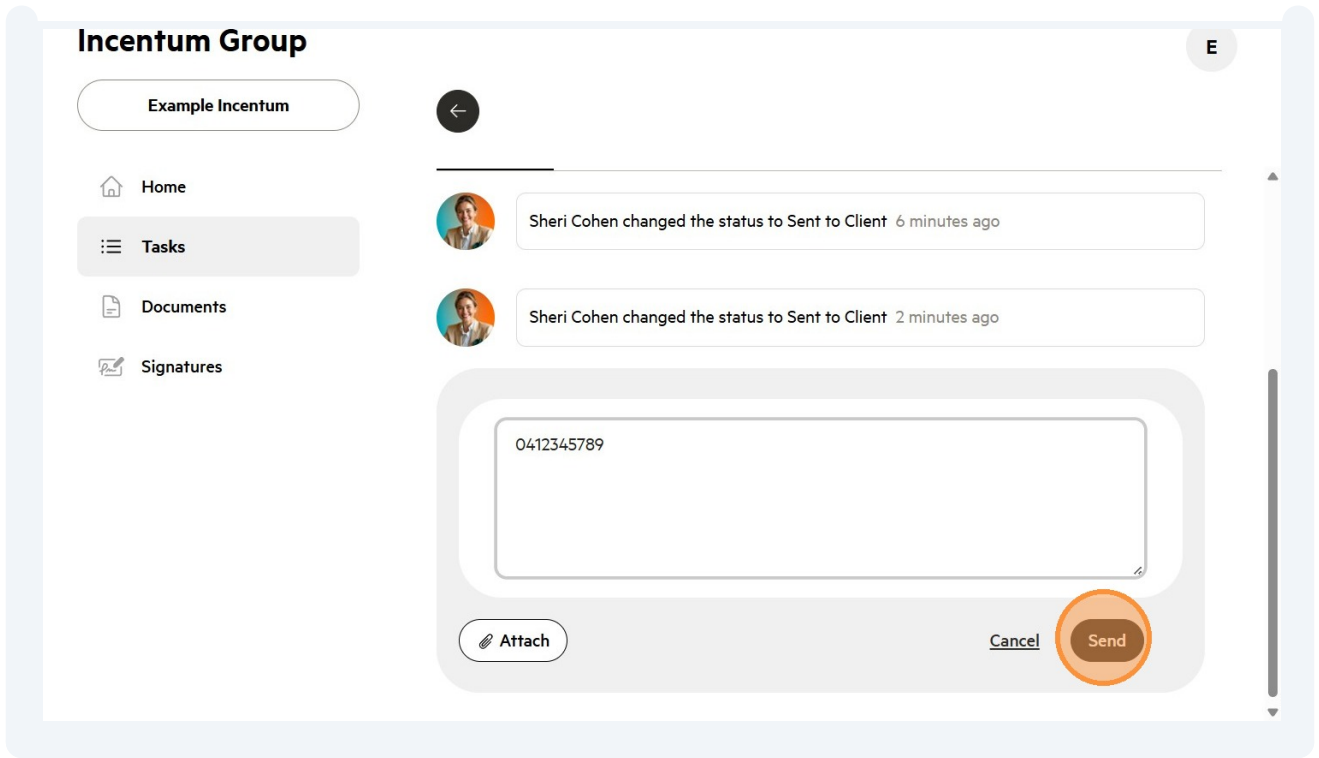


Sheri Cohen changed the status to Sent to Client 6 minutes ago

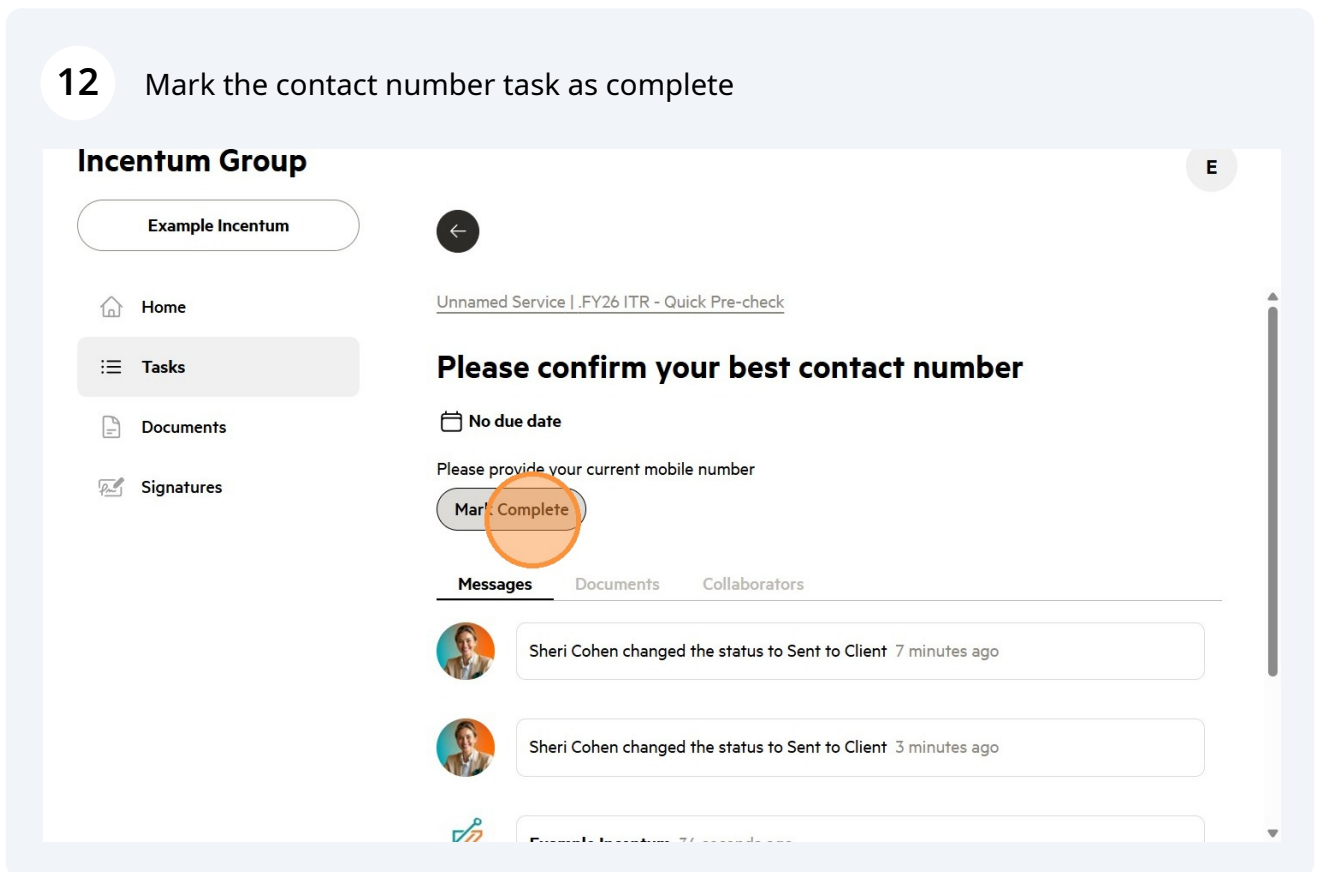


Sheri Cohen changed the status to Sent to Client 2 minutes ago

Reply here...



## 12 Mark the contact number task as complete



### 13 Open the task to confirm your portal email address

#### Incentum Group

Example Incentum

- Home
- Tasks
- Documents
- Signatures

Please confirm the best email address to link you new portal a...  
Please provide another email address if you wish for your portal to be linked to that email instead.

View Details

No due date  
.FY26 ITR - Quick Pre-check

Do you have a spouse/partner for tax purposes? If yes, please ...

View Details

No due date  
.FY26 ITR - Quick Pre-check

Would you like to give your partner access to your portal f...

View Details

No due date  
.FY26 ITR - Quick Pre-check

### 14 Provide your preferred email address as a comment and click send.

#### Incentum Group

Example Incentum

- Home
- Tasks
- Documents
- Signatures

No due date

Please provide another email address if you wish for your portal to be linked to that email instead.

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 8 minutes ago



Sheri Cohen changed the status to Sent to Client 4 minutes ago

+ Comment

+ Upload document

# Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures

No due date

Please provide another email address if you wish for your portal to be linked to that email instead.

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 8 minutes ago



Sheri Cohen changed the status to Sent to Client 4 minutes ago

Reply here...

# Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures



Sheri Cohen changed the status to Sent to Client 8 minutes ago



Sheri Cohen changed the status to Sent to Client 4 minutes ago

example@incentum.au

Attach

Cancel

Send

## 15 Mark the email confirmation task as complete

### Incentum Group

Example Incentum

Home

Tasks

Documents

Signatures



E

**Please confirm the best email address to link you new portal account to, if not this one.**

No due date

Please provide another email address if you wish for your portal to be linked to that email instead.

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 8 minutes ago



Sheri Cohen changed the status to Sent to Client 4 minutes ago



## Income Reporting

## 16 Select the rental income inquiry task

### Incentum Group

Example Incentum

Home

Tasks

Documents

Signatures



E

.FY26 ITR - Quick Pre-check

**Did you receive rental income in FY26?**

If yes, from how many properties in total during FY26 (including those sold)? Please provide addresses if jointly owned advise wit...

View Details

No due date

.FY26 ITR - Quick Pre-check

**For jointly owned properties would one or both of you like...**

if not applicable, please click mark as complete and move onto the next section if you would both like access please write in the...

View Details

No due date

.FY26 ITR - Quick Pre-check

**Is there anything unusual or important that happened duri...**

17

Confirm rental income status and provide property details via the comment section.

### Incentum Group

E

Example Incentum



Completed [mark incomplete](#)

Home

Tasks

Documents

Signatures

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 9 minutes ago



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Example Incentum 3 seconds ago  
yes



+ Comment

+ Upload document

### Incentum Group

E

Example Incentum



Completed [mark incomplete](#)

Home

Tasks

Documents

Signatures

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 9 minutes ago



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Example Incentum 17 seconds ago  
yes

...

Edit

Delete

Example Incentum changed the status to Completed 14 seconds ago

# Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures



## Did you receive rental income in FY26?

No due date

If yes, from how many properties in total during FY26 (including those sold)?

Please provide addresses

If jointly owned advise with whom, and whether you would both like accc

Completed [Mark Incomplete](#)

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 9 minutes ago



Sheri Cohen changed the status to Sent to Client 5 minutes ago

# Incentum Group

E

Example Incentum



Home

Tasks

Documents

Signatures

Mark Complete

Messages Documents Collaborators



Sheri Cohen changed the status to Sent to Client 9 minutes ago



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Example Incentum changed the status to Completed 27 seconds ago

+ Comment

+ Upload document

## Incentum Group

E

Example Incentum

Home

Tasks

Documents

Signatures



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Example Incentum changed the status to Completed 27 seconds ago

Reply here...



Attach

Cancel

Send

## Incentum Group

E

Example Incentum

Home

Tasks

Documents

Signatures



Sheri Cohen changed the status to Sent to Client 5 minutes ago



Example Incentum changed the status to Completed 27 seconds ago

3 properties

2 Smith Street - I own solely

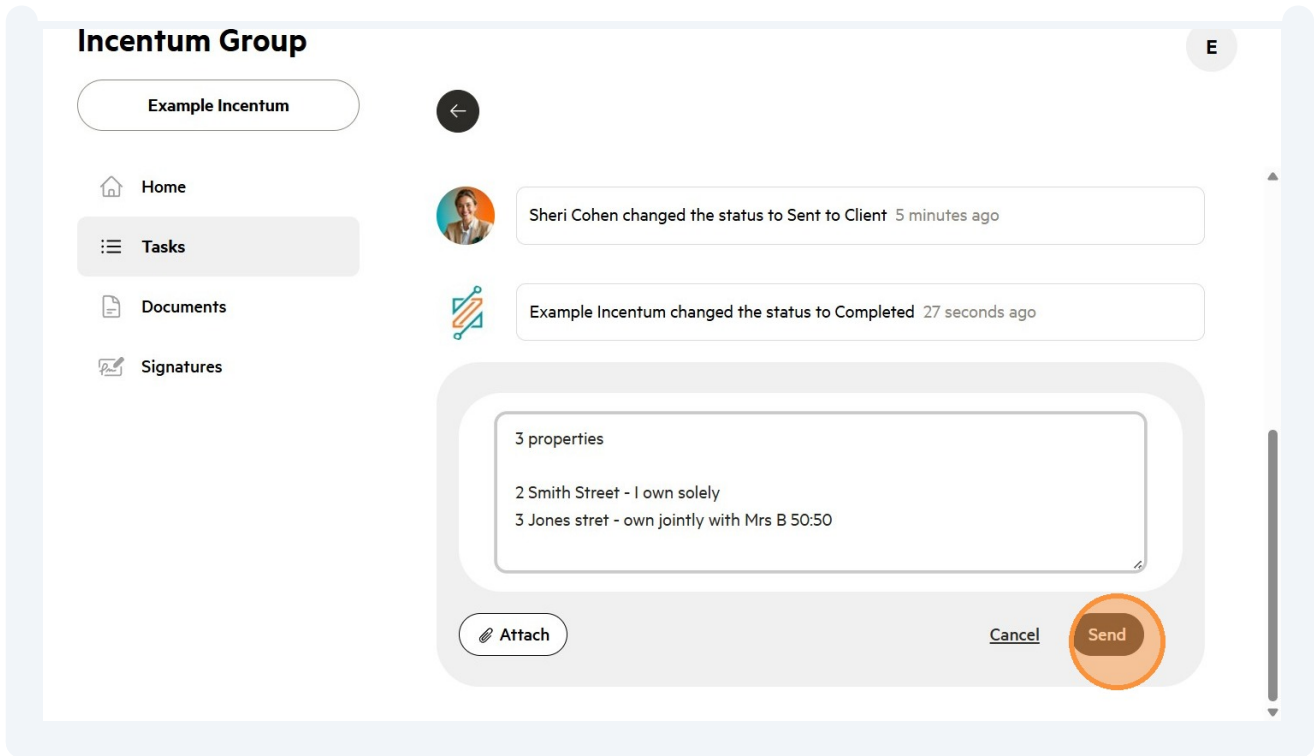
3 Jones stret - own jointly with spouse 50/50



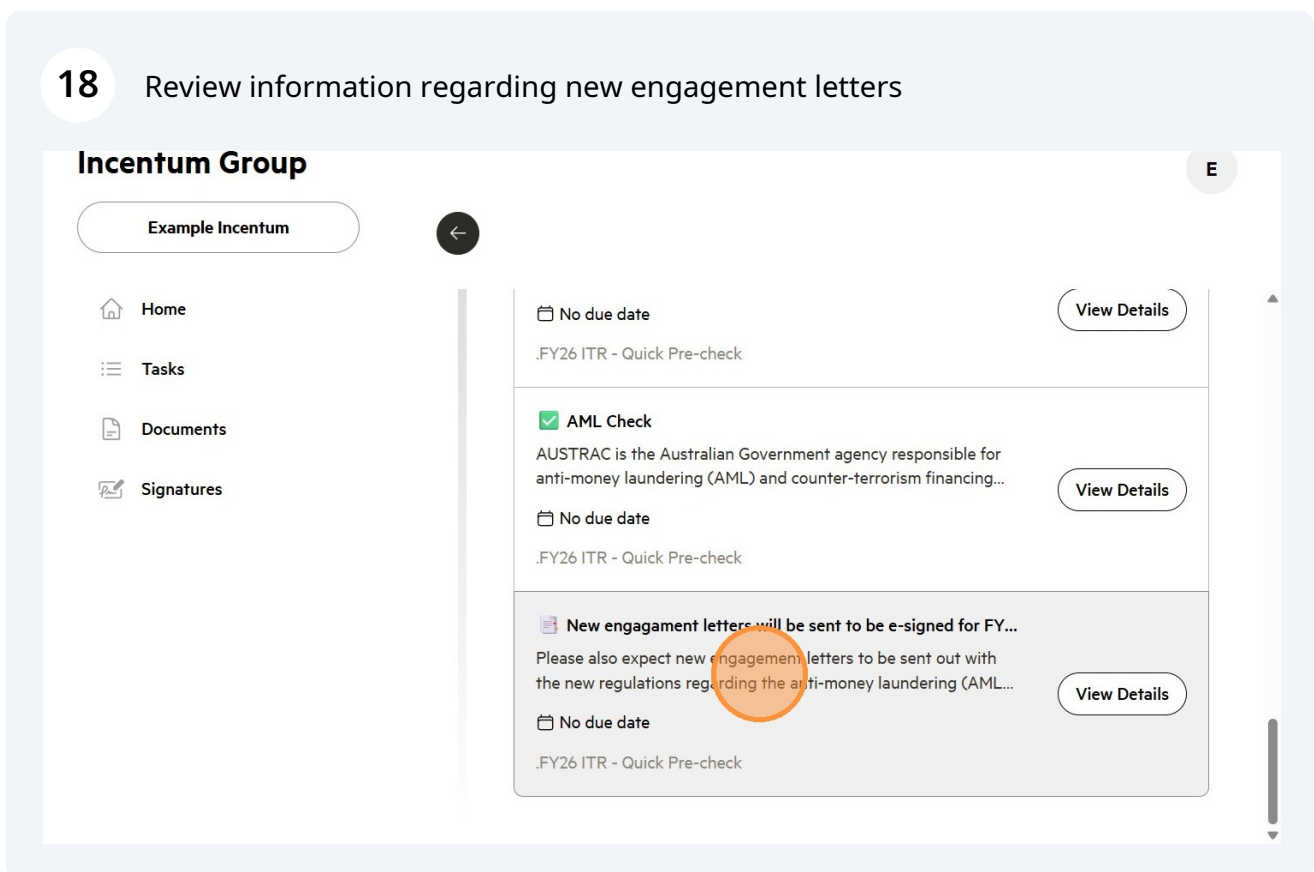
Attach

Cancel

Send



## 18 Review information regarding new engagement letters



## Final Compliance and Completion

## 19 Click "Mark Complete" for the AML Check task

### Incentum Group

Example Incentum

Home

Tasks

Documents

Signatures

Unnamed Service | .FY26 ITR - Quick Pre-check

#### ✓ AML Check

No due date

AUSTRAC is the Australian Government agency responsible for **anti-money laundering (AML) and counter-terrorism financing (CTF) regulation**.

AML/CTF checks are now required as part of Australia's anti-money laundering and counter-terrorism financing laws from 1 July 2026.

Accounting firms providing certain designated services will be required to carry out customer due diligence, keep appropriate records and identify potential money laundering or financial crime risks before providing relevant services for all clients.

Any unusual or higher-risk matters will be escalated for review before the engagement is accepted or work is commenced.

You will receive an email titled: **'Identity verification request from Ronesh Hargovind'** from [noreply@nowinfinity.com.au](mailto:noreply@nowinfinity.com.au).

Further details about the process can be found at: \_\_\_\_\_

Mark Complete

## 20 Open the task regarding unusual tax-related events

### Incentum Group

Example Incentum

Home

Tasks

Documents

Signatures

if not applicable, please click mark as complete and move onto the next section if you would both like access please write in the...

View Details

No due date

.FY26 ITR - Quick Pre-check

🚨 Is there anything unusual or important that happened duri...

No due date

View Details

.FY26 ITR - Quick Pre-check

#### ✓ AML Check

AUSTRAC is the Australian Government agency responsible for anti-money laundering (AML) and counter-terrorism financing (CTF) regulation. AML/CTF checks are now...

Completed 2 seconds ago

.FY26 ITR - Quick Pre-check

📄 New engagement letters will be sent to be e-signed for FY26

## 21 Navigate back to the main task list

**Incentum Group** E

**Example Incentum** ←

- Home
- Tasks
- Documents
- Signatures

Please provide a copy of driving license, front and back or your passport  
Completed 49 seconds ago  
.FY26 ITR - Quick Pre-check

**Please provide your TFN Number and latest Notice of Assessment**  
Please either provide your latest Notice of Assessment assuring that the TFN has not be blanked out or provide just your TFN  
Completed 44 seconds ago  
.FY26 ITR - Quick Pre-check

**Please confirm your best contact number**  
Please provide your current mobile number  
Completed 4 minutes ago 1  
.FY26 ITR - Quick Pre-check

## 22 Confirm that all items in the checklist are completed and none say View details.

**Incentum Group** E

**Example Incentum** ←

- Home
- Tasks
- Documents
- Signatures

**Unnamed Service**

.FY26 ITR - Quick Pre-check  
STARTING SOON

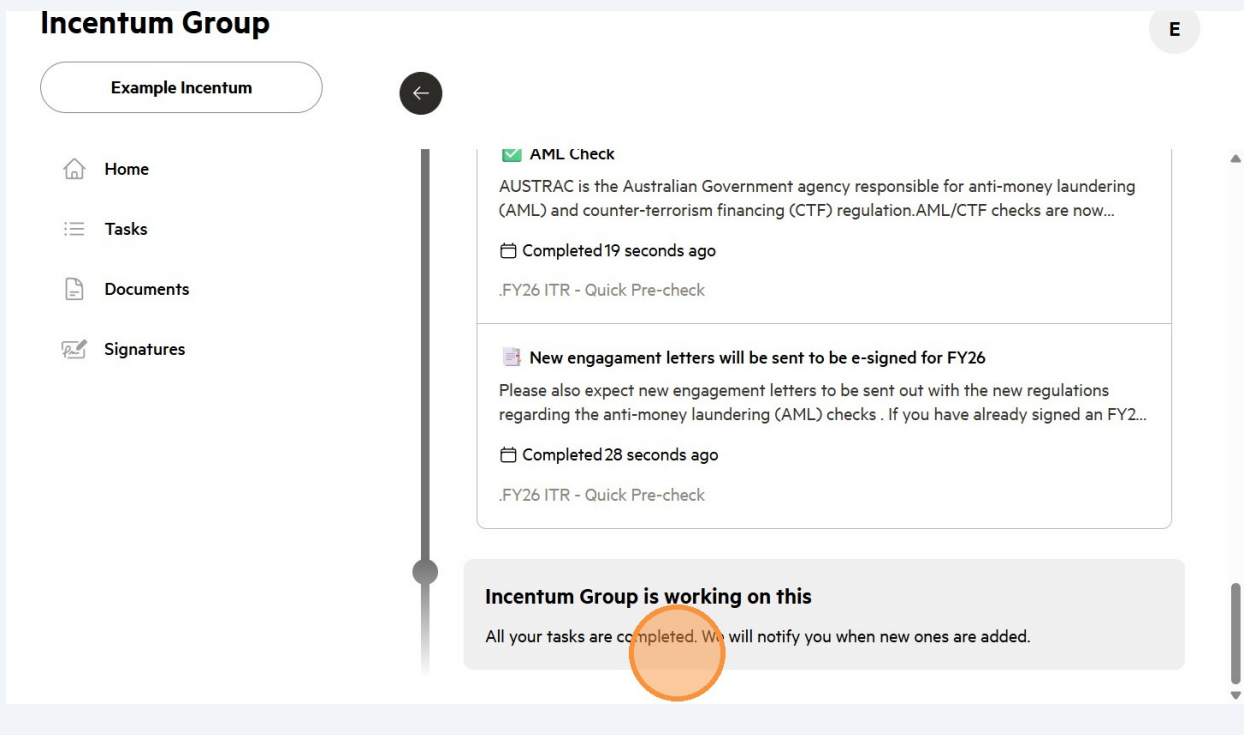
**Tasks**

**FY26 Individual Return - Quick Pre-check** COMPLETED ^  
8 minutes ago

Please read this first.  
★ Welcome to our new FY26 Incentum Tax Portal ★ We hope this portal will allow our clients to upload their documents and give all necessary information we require to...

23

You will then receive a message as this - All your tasks are completed. We will notify you when new ones are added."



24

The checklist is complete and has been sent to Incentum Team for review. Once checked we will shortly send information for the FY26 checklists.