

"Here's a handy checklist to help you find everything you need to do your tax return"



2023 Business Tax Return Checklist

Information Required:

- Access to source data / accounting records. _____
- Bank statement & reconciliations at 30 June 2023. _____
- All Loan statements to 30 June 2023. _____
- Government grants & subsidies received. _____
- Stock on hand at 30 June 2023. _____
- Debtors & Creditors @ 30 June 2023. _____
- Taxable payments report for contractors. _____
- New chattel mortgage/Hire purchase/Lease agreements. _____
- Details of any new equipment purchased or traded. _____
- Property purchase and sale contracts. (Inc Settlement Statements) _____

- Livestock numbers at 30 June 2023. _____
- Farm management deposits & withdrawals. _____
- BAS working papers _____
- Interest & dividends received. _____
- Rental property income & expense details. _____
- Other investment information. (such as share sales & purchases and managed fund tax statements) _____
- FBT Declarations for Motor vehicles. _____
- Superannuation & life insurance contribution statements. _____
- Technology Investment & Skills Training Expenditure _____
- Income protection insurance premiums paid. _____
- Bank Account Details for refunds. _____