

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



## 2025 Business Tax Return Checklist

### Information Required:

- ☐ Access to source data / accounting records. \_\_\_\_\_
- ☐ Bank statement & reconciliations at 30 June 2025. \_\_\_\_\_
- ☐ All Loan statements to 30 June 2025. \_\_\_\_\_
- ☐ Government grants & subsidies received. \_\_\_\_\_
- ☐ Stock on hand at 30 June 2025. \_\_\_\_\_
- ☐ Debtors & Creditors @ 30 June 2025. \_\_\_\_\_
- ☐ 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 2025. \_\_\_\_\_
- ☐ 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. \_\_\_\_\_
- ☐ Small Business Energy Incentive Expenditure \_\_\_\_\_
- ☐ Income protection insurance premiums paid. \_\_\_\_\_
- ☐ Bank Account Details for refunds. \_\_\_\_\_