



LEDGER  
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CHARTERED ACCOUNTANTS

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#### ◆ BUSINESS CHECKLIST

In order to facilitate the timely completion of your tax return, we ask that details of the following items be included with your papers.

The highlighted items (\*\*) require close attention.

1. Bank Statement including Loan statements
2. Cheque Butts
3. Details of Deposits/Bankings
4. \*\* Purchases of fixed assets
5. \*\* Hire Purchase or Lease agreements on any new equipment
6. Stock on Hand and Work in Progress at end of year
7. Detailed list of Debtors (money owing to you) at end of year
8. Detailed list of Creditors (money you owe) at end of year
9. \*\* Detail of all Insurances - especially the split up of the Farm Packages
10. Dividend Notices including Franking Credit details. Details of all share sales and purchases
11. Interest Received details including any withholding tax deducted
12. Rental Statements for properties owned during the year
13. Notice from Centrelink showing details of any allowances received
14. \*\* Motor Vehicle Speedometer Readings at end of year
15. \*\* Private Health Insurance tax statement

We have provided general information for guidance only in this newsletter. For business and personal taxation planning, or other professional advice having regard to your circumstances, please come and see either Charles or Matthew.