

# TAX RETURN CHECKLIST



BUSINESS



ASC  
*Accountants*

# PREPARE YOUR TAX RETURN Steps

## 1 Book

- Book your appointment with us via phone, email or website
  - Provide general information
- Following our prompts on our online booking system or over email

[Click here for website booking.](#)

## 2 Gather

- Gather the information required as per this checklist

## 3 Meet and Greet

- Once we've reviewed all your information, we'll be ready for a chat to finalise your return and answer any tax-related questions you might have. We offer email, Zoom, phone calls meetings

## 4 That's All

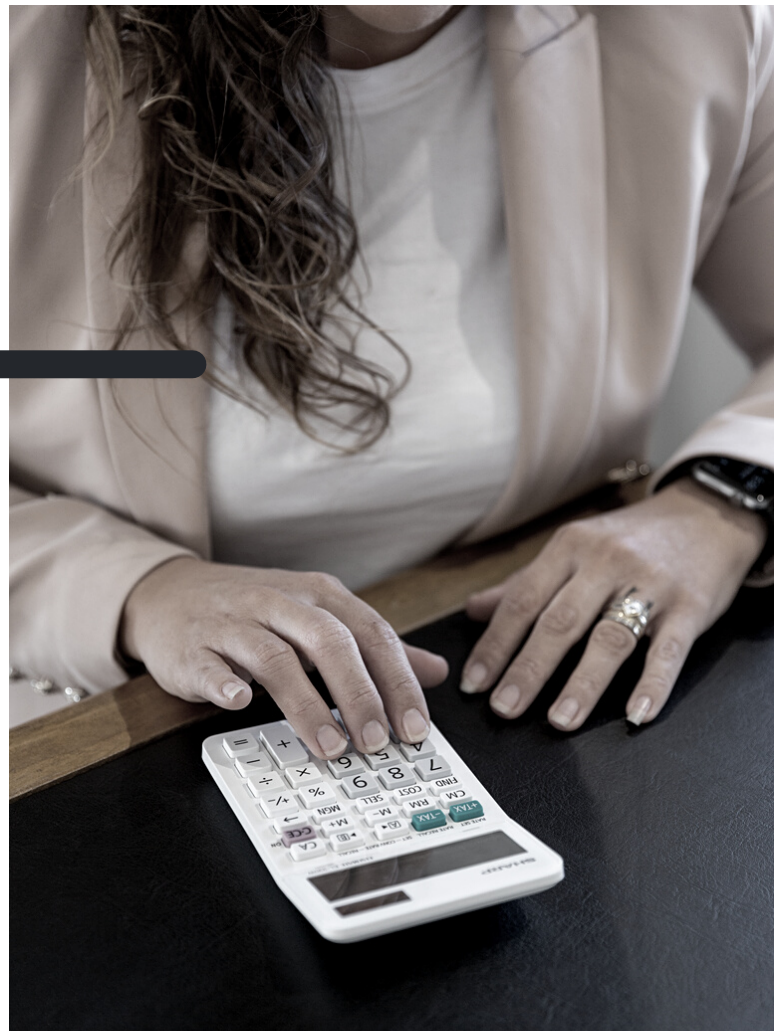
- After your tax return is finalised, we will send it to you for electronic signing - no printing required
- After you sign and pay our preparation fee, we will lodge your return to the Australian Taxation Office (ATO). The ATO will then process your return and any tax refund due will automatically be deposited into your nominated account





# TAX RETURN CHECKLIST

## SMALL BUSINESS



### INCOME

- Sales Invoices
- Contract Income
- JobKeeper Income
- Government Grants received
- Insurance Recovery Notices

### DEDUCTIONS:

- Accounting Fees
- Advertising and Marketing
- Bank Fees
- Bookkeeping Fees
- Cost of Goods Sold/Stock Purchases
- Materials
- Office &/or Home Office - Electricity, Rates
- Insurance Policies
- Interest Expenses
- Merchant Fees
- Motor Vehicle Expenses
- Freight and Cartage
- Wages, Superannuation and Workcover
- Printing, Stationery and Postage
- Rent and Outgoings
- Repairs and Maintenance
- Staff Amenities
- Subcontractor Fees
- Software and Subscription Fees
- Telephone and Internet
- Tools of trade
- Training and Workshops
- Travel Expenses
- All other Expenses

### OTHER:

- Accounting file is reconciled\*\*
- GST reporting is finalised\*\*
- Stock On Hand
- Business Bank Statements
- Business Loan Statements Business
- Credit Card Statements
- Petty Cash
- Paperwork for any new Finance Agreements
- Plant and Equipment Purchases
- Superannuation Contributions
- Any new Assets Purchased

\*\* Unless we complete this work

# Get in touch

Phone:  
0447 517 315

Email:  
[info@ascaccountants.com.au](mailto:info@ascaccountants.com.au)

Website:  
[www.ascaccountants.com.au](http://www.ascaccountants.com.au)



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