



What do I need to bring to spend my time more effectively with my accountant?

My Tax Checklist – Business

Name: _____

Appointment with: _____

Date: _____ Appointment time: _____

- New to JPA – we require:**
 - Your previous year tax return, financials and depreciation schedule.
 - Access to online software if using a cloud-based accounting system such as Quickbooks Online, Xero, MYOB and Reckon
- Business records – eg. Cashbook, print out of reports
 - If using excel or other accounting software – please supply a USB or email admin@jpickersgill.com.au with the file and/or back-up, be sure to add the program, version and access information (eg. username and password)
- Trading stock on hand
- Bank statements for the entire financial year (1 July – 30 June)
- Loan documents for the entire financial year, including any new loan contracts
- Details of any business income and expenses. Including invoices for:
 - Insurance documents
- Details of any other income received (eg. rental and grants)
- Invoices – for any business-related asset purchases over \$300
- Invoices – for any business-related new constructions (eg. new shed)
- Motor Vehicle – logbook if applicable eg. sedan
- Shares and property sales and associated purchase documentation of items sold within the financial year
- Dividends and annual tax statements
- Personal super contributions – Acknowledgement of Notice of intent to claim
- Income protection insurance statement if outside of superannuation