



BUSINESS TAX DOCUMENT CHECKLIST

Please complete this checklist and provide with your documents.

Please note we are unable to start your return until this document has been completed and provided

Please tick each attachment you provide to us

Please provide copies of each ticked document (and not originals)

Accumulate
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Applecross WA 6153

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P + 61 8 9364 4204

CLIENT NAME _____ PHONE _____

ADDRESS _____

- New Clients Only** - Please provide a copy of your prior years Tax Return
- Bank statements showing balance at 30 June
- Bank statements showing total interest for year
- Software provider (Xero, MYOB etc) and version (if applicable): _____
Username: _____ PW: _____
- Other records for non software clients
- Rental property (please complete rental property document checklist)
- Equipment disposals - asset description, amount received and date sold
- Equipment purchases - asset description, amount paid and date purchased
- Value of closing stock at 30 June
- Details of payments to related parties
- Loan statements showing balance at 30 June
- Loan statements showing total interest for year
- Copies of all payment summaries for employees
- Copy of Annual Payment Summary reconciliation
- Finance documents for new assets
- Details of all motor vehicle expenses
- Copies of motor vehicle log books
- Shares - buy and sell contracts
- Shares - dividend statements
- Other: Please specify _____
- Other: Please specify _____
- Other: Please specify _____

Additional Notes:

