

2023 Business Tax Return Checklist




For the period 1 July 2022 to 30 June 2023

Business details		
Legal name		
ABN or TFN		
Postal address		
Place of business address		
Nominated contact person(s)		
Contact number		
Contact email address		
Business bank details	BSB	Account
What's your business activity ?		

Recordkeeping			
How did you keep your records?	Online accounting software	Microsoft Excel / Apple Numbers	Other

You must provide us your recordkeeping data or authorise us access to your file.

Send invitations for accounting software to the email addresses below. Be sure to select Adviser/Accountant role and include Manage Users rights and Payroll access if applicable.

 Xero Samantha Holder sam@generaltax.com.au	 QuickBooks Graham Robinson admin@generaltax.com.au	 MYOB Graham Robinson graham@generaltax.com.au
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Business accounts and business loans				
How many business bank accounts do you have?	0	1	2	3+
You must provide copies of bank statements for all bank accounts showing 30/06/2023.				
How many business loans do you have?	0	1	2	3+
You must provide copies of bank statements for all business loans showing 30/06/2023.				
How many business credit cards do you have?	0	1	2	3+
You must provide copies of credit card statements up to and including 30/06/2023.				

Assets

Did you have **stock on hand** as at 30/06/2023?

Yes

N/A

Amount

Did you **purchase assets** (excluding stock) during the year? (>\$20k)

Yes

N/A

You must provide asset description, date of purchase, and purchase price.

Did you **sell assets** (excluding stock) during the year?

Yes

N/A

You must provide asset description, date of sale and sale price.

Motor vehicles

How many **vehicles** does your business own?

0

1

2

3

4+

If motor vehicle is being claimed, we require for each vehicle either A or B:

A Provide **logbook percentage** (if applicable), or

%

B Provide **number of kilometres travelled**. (Max 5,000kms)

kms

Finance / lease / hire purchase agreements

Did you **enter into or refinance any agreements** during the year?

Yes

N/A

You must provide copies of any new finance agreements or lease contracts.

Did you **pay out** any agreements during the year?

Yes

N/A

You must provide details about the loan or agreement that was paid off.

Do you have any **notes or comments** for GTS?

**If you're a new client referred by someone, provide their name here. We'll send them a reward.*