

INCOME TAX CHECKLIST



2024 Minimum Records Requirement

		N/A	ATTACHED	PER COMPUTER FILE
1	30th June 2024 Bank Statement for each of your accounts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	All Bank Loan statements for the 12 months.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Bank Bill Statements covering 30th June 2024.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Farm management deposit statements showing 30th June 2024 balances.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Documentation for sale and/or purchase of property made during the 2024 financial year including contracts, solicitor's letters, legal fees and settlement statement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Copy of all new leases and asset purchase agreements and respective tax invoices for equipment financed unless provided earlier.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Rental property annual statements provided by your Real Estate Agent.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Copy of Payment Summaries issued by you to employees (if Single Touch Payroll is not used).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	If you are a business within the Building and Construction industry and have been required to lodge a Taxable Payments Annual Report (TPAR), please provide a copy (unless prepared by HHH Partners).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Copy of Business Insurance Policies unless otherwise provided.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	2024 Annual Private Health Rebate Statements (if issued by your provider).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	All Dividend Statements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13	If computerised, your data backup reconciled to 30th June 2024.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14	<p>Please note the following additional forms may need to be completed. Please click on form you need below:</p> <ul style="list-style-type: none"> Debtors Listing Creditors Listing Motor Vehicle Speedo Reading Stock on Hand Wages Reconciliation 	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15	Bank account details including BSB, account number and account name for income tax refunds. (Please note that the ATO no longer issues refund cheques).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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