

# INCOME TAX CHECKLIST



## 2023 Minimum Records Requirement

		N/A	ATTACHED	PER COMPUTER FILE
1	30th June 2023 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"/>
3	Bank Bill Statements covering 30th June 2023.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Farm management deposit statements showing 30th June 2023 balances.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Documentation for sale and/or purchase of property made during the 2023 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	2023 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 2023.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14	Please note the following additional forms may need to be completed. Please click on form you need below: <ul style="list-style-type: none"><li><a href="#">Debtors Listing</a></li><li><a href="#">Creditors Listing</a></li><li><a href="#">Motor Vehicle Speedo Reading</a></li><li><a href="#">Stock on Hand</a></li><li><a href="#">Wages Reconciliation</a></li></ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15	Bank account details including BSB, account number and account name for income tax refunds. <b>(Please note that the ATO no longer issues refund cheques).</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# HHH PARTNERS