



KADOTA ACCOUNTING PTY LTD
Incorporating Knox Taxation and Business Advisory



2026

TAX RETURN

CHECKLIST

Businesses

Use our checklists to help save
you valuable time preparing
for your 2026 tax appointment.

Business Records Checklist

1. Did you have any loans during the year?	Yes ☐ No ☐
If no, go to question 2. If yes, provide copies of existing Loan Statements for the <u>whole</u> year (check for missing pages) along with copies of Agreements for any New Loan, Hire Purchase and/or Lease which were entered into or commenced during the year.	
2. Did you have employees during the year?	Yes ☐ No ☐
If no, go to question 3. If yes, provide the following – ☐ PAYG payment summary statement for Wages paid during the year; and ☐ An annual summary of your Superannuation obligations showing each employee's name, his/her gross annual wage and the contributions made.	
3. Did you sell assets during the year - shares/property/business?	Yes ☐ No ☐
If no, go to question 4. If yes, provide Purchase and Sale documents for any assets acquired after 19 September 1985 and sold during the year for Capital Gains Tax calculations (e.g. shares, rental property, vacant land, a business etc).	
4. Did your business receive rental income during the year?	Yes ☐ No ☐
If no, go to question 5 If yes, provide Rental property income and expenses, including agent's annual or monthly statements, interest on loan(s) and a <u>summary</u> of any expenses paid by you direct. Please also supply solicitor's letter, settlement sheets and any other purchase documents if you acquired the property during the year.	
5. Did you receive any income not included in 1 above?	Yes ☐ No ☐
If no, go to question 6. If yes, provide full details of amounts received, any GST included therein and indicate where those funds were deposited.	
6. Did your business have unpaid invoices at 30 June?	Yes ☐ No ☐
If no, go to question 7. If yes, provide a list of the following amounts where applicable <u>if not shown on computerised or other records in question 1 above</u> - ☐ amounts owing to you by clients/customers at 30 June (Debtors). ☐ amounts owing by you to suppliers at 30 June with individual totals for each category of expense such as stock, advertising, motor vehicle expenses, telephone etc (Creditors).	
7. Did your business sell trading stock during the year?	Yes ☐ No ☐
If no, go to question 8. If yes, provide a list of stock on hand at 30 June and the cost thereof.	

