

Business income & expenses checklist

1 Business Income

- ☐ Business income received during the financial year.

2 Business expenses paid, if applicable

Tick the categories that apply and have the supporting records ready.

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|---|---|
| ☐ Advertising | ☐ Accounting and bookkeeping fees |
| ☐ Mobile and internet | ☐ Rent paid on office premises |
| ☐ Materials and supplies | ☐ Tools and equipment, such as a laptop |
| ☐ Stationery and computer consumables | ☐ Professional memberships and subscriptions |
| ☐ Professional development fees | ☐ Repairs and maintenance for equipment |
| ☐ Protective gear | ☐ Subcontractors, if any |
| ☐ Insurances
Professional indemnity, public liability, income protection (outside super), cyber insurance, workers compensation, and similar. | |
| ☐ Travel to client sites and meetings
Please confirm the number of kilometres travelled, or provide your logbook along with running costs. If a vehicle was purchased, also send the purchase invoice and the loan agreement or documentation so we can calculate any interest deduction. | |
| ☐ Employee expenses (wages, super), if any
Please provide the STP report for the financial year. | |
| ☐ Home office – hours or electricity/gas expenses | |

TWO THINGS TO TELL US

- 1 If any of the above has a private-use portion, please let us know.
- 2 If you have other business expenses not listed here, please let us know.