

✓ TAX TIME CHECKLIST FOR SOLE TRADERS/SMALL BUSINESS	TOTAL \$	BUSINESS %
Cost of sales		
Advertising and promotion		
Online & Print ads - Facebook, Instagram, newspapers, magazines		
Promotional Printing – client postcards or Christmas cards, pens, mugs etc		
Website expenses - hosting, plug-ins, themes, writers, photography etc		
Home Office (business portion)/Rented Office Space		
Rent		
Insurance		
Utilities		
Repairs & maintenance		
Office Expenses		
Equipment		
Postage		
Supplies/Stationery		
Software		
Motor Vehicle*		
Interest on car payments		
Fuel or Gas		
Insurance		
Parking & Tolls		
Registration & License Fees		
Repairs & Maintenance		
Depreciation		
Taxi/Uber		
Car Wash		
Education/Staff Training		
Online and in-person courses		
Professional Development		
Workshops and Training		
Books/Resources		
Other (where applicable to business use or accounts only)		
Legal & Professional Fees		
Business Insurance		
Meals & Entertainment		
Travel - airfares, hotel, taxis		
Subcontractor Fees/Salaries & Wages		
Bank fees		
Credit Card/PayPal Processing fees		
Subscriptions to online services		
Mobile phone		
Internet		
Subscriptions to online services (Dropbox, Accounting Software, schedul-		
Donations >\$2		
Bookkeeping/Accounting Fees		
Tax agent fees		
* Vehicle make, model and registration	Total kms	Business kms

Number of hours worked at home: _____

SOLE TRADER TAX TIME DOCUMENTS NEEDED

✓ Sole Traders Checklist - Documents to Provide	
	Invite into data file (if applicable)
	Upload spreadsheet / reports (if no data file)
	Bank statement for all business accounts at 30 June 2021
	Loan statements / finance documents for all loans / hire purchase
	Prior year tax return
	Copies of all BAS activities lodged (if applicable) and we don't lodge on your behalf, and any supporting workings