



HAMPTON PARTNERS

—Bridgetown - Boyup Brook - Nannup—

BUSINESS CHECKLIST 2025

NAME: _____

BUSINESS ADDRESS: _____

PHONE: _____ MOBILE: _____ EMAIL: _____

ABN: _____ Are you registered for GST? Yes ☐ No ☐

For your 2025 Business Tax Affairs, please include the following where relevant:

- ☐ BANK STATEMENTS (for the period 1 July 2024 to at least 30 June 2025) and Bank reconciliation (if manually prepared)
- ☐ DETAILS OF BUSINESS INCOME AND EXPENSES
- ☐ BACK UP OF YOUR DATA FILES if you use a software package to keep your records.
Software Name: _____ Version: _____ Cloud Based Y or N
- ☐ LOAN STATEMENTS (Include documentation in relation to any new loans taken out or draw down on existing loans during the year 1 July 2024 to 30 June 2025)
- ☐ Value of RETAIL TRADING STOCK ON HAND at year end? (Cost Price - excl GST) _____
- ☐ CREDITORS at year end. (List detailing type of expenses e.g. Fuel, Repairs, Stock)
- ☐ DEBTORS at year end. (List who owes you, how much and for what)
- ☐ INVOICES FOR ANY EQUIPMENT PURCHASED and finance arrangements
- ☐ FARM MANAGEMENT DEPOSIT Statement (detailing transactions from 1 July 2024 to 30 June 2025)
- ☐ Statements for LIVESTOCK TRADING
- ☐ LIVESTOCK NUMBERS - please complete if applicable

	Cattle	Sheep	Other
Stock on Hand 01/07/24			
Purchases			
Natural Increase			
Total			
Sales			
Deaths			
Killed for Rations			
Closing Stock at 30/06/25			
Total (should agree with total above)			

☐ **Taxable Payment Annual Statement Report** Yes ☐ No ☐

☐ **Payroll STP Finalisation Report** Yes ☐ No ☐

☐ **Details of any CAPITAL GAINS /LOSSES** for your business (e.g. sale of asset)

(Please provide CHESS Statements, Buy & Sell Contracts , Offer & Acceptance and Settlement statement if not previously provided)

☐ **MOTOR VEHICLE CLAIM** There are two claim methods available.

1. Cents per km - You can claim up to 5,000km (88 cents per km for 2025) or
2. Logbook - with 12 consecutive weeks recorded

(If applicable) I / we and / or entities as named in this document, authorise Hampton Partners to:

Vehicle	Owner's Name	Business Use %	Annual Odometer Reading

- ☐ Provide all documentation relevant to my financial and income tax affairs by email delivery when requested by me
- ☐ Provide any information requested by banks and other institutions in relation to my affairs to be delivered by email when requested by me
- ☐ Access my financial data from my Cloud Accounting Management Software

Signature

Date

Signature

Date

Please return this completed form to us with your tax documents

Bridgetown Office
116 Hampton Street, (PO Box 48)
Bridgetown WA 6255
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Email: admin@hpb.com.au

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