



CHAPPEL ACCOUNTING PTY LTD

PUBLIC ACCOUNTANT & TAX AGENT

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Business Clients – End of Financial Year Information Required

It is time to lodge your 2022 End of Year Returns. Below is a list of some of the information we may require to complete your End of Year work:

- Stocktake – if required (If you are new to business particularly).
- Cattle Numbers – if required
- Copies of your bank statements to 30 June 2022 **for compliance purposes**
- Copies of all loan statements and term deposits from 1 July 2021 to 30 June 2022
- Income Statements for any other wages received
- Interest Income from Banks and Building Societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Rental Property information
- Capital Gains information
- Crypto Trading information
- Health insurance and rebate entitlement statement
- Did you purchase any new investments? EG: Shares / rental properties – documents required

Please contact us if you require any further assistance with any of the above points. Your assistance in providing this information in a timely manner will ensure we're able to meet your ATO deadlines.

Please post, email or fax through this information so we can progress your end of year work. As this time of year is very busy for us please be aware that your jobs will queue and will be processed in the order of receiving them in this office.

For Tax Refunds – Please ensure you have your Bank Account Details including BSB and Account Number