



# EOFY Checklist

*Stay Organised.*

As EOFY approaches, it's time to tidy up your records, manage your deductions, and plan ahead. Check out our checklist to stay on track.

## 1 Get Your Paperwork in Order

Having your documents up to date can streamline EOFY reporting. Make sure you have:

- Income statements & profit and loss reports
- Receipts for business-related purchases (including assets)
- Motor vehicle and travel expense records related to your business
- Tax returns, BAS, GST returns & super contribution records

## 2 Simplify Accounting with Online Tools

Make tax time smoother by separating personal and business banking.

- Track Business performance and manage cash flow
- Share 'view only' access with your bookkeeper or accountant
- Connect bank feeds to MYOB, Xero and more.

Digital tools can make a big difference at EOFY.

## 3 Maximise Your Deductions

Claiming all eligible deductions is smart business. Take a look at the [ATO website](#) to see what is claimable. Tip: Keep receipts and documentation to support every claim.

## 4 Meet Your Superannuation Obligations

If you employ staff, ensure Superannuation Guarantee contributions are:

- Paid by June 30 to claim tax deduction this financial year
- Sent to a complying super fund or retirement savings account

Missing deadlines can impact your deductions - plan ahead.

## 5 Stay on Top of Key Dates

ATO deadlines wait for no one

- Add key dates to your calendar
- Set reminders for lodgements and payments
- Visit the ATO website for a full due date list

Avoid penalties - keep your business compliant and running smoothly

**Need any help with EOFY finance or equipment?** Contact us at 1300 322 092 or visit our website [HERE](#).

