

# Partnership Tax Checklist

## For the year ended 30 June 2020

**Client Name**

The following is a list of documents and information we may require to commence, the preparation of the financial statements and income tax return of the partnership.  
(Please note some of the items below may not apply to your situation)

### **Income:**

Please provide information relating to the following:

- Interest Received.
- Dividends Received.
- Partnership Distributions Received.
- Details of any income the partnership may have received.

### **Deductions:**

Please provide information relating to the following:

- Deductions relating to interest and dividends received.
- Details of other deductible expenditure.
- Details of rental deductions.

### **Other Information:**

Please provide information relating to the following where applicable:

- Soft copy of the accounting data file for the partnership for the year ended 30 June 2020 (e.g. MYOB or Quickbooks file),
- Details of any purchases of property or other investments, including
  - Date of purchase
  - Purchase price
  - Incidental costs
- Details of any sales of property or other investments, including
  - Date of sale
  - Sale price
  - Incidental costs
- Details of any depreciable assets purchased and/or sold.
- Bank records (statements, cheque butts and deposit books) where appropriate.

### **Business Activities**

If you commenced, ceased or carried on a business during the year, please refer to our Business Checklist.