

FARMER'S CHECKLIST



Client Name: _____

Farm Records

- Backup of current data file
- Finance contracts and purchase invoices for any new plant and equipment purchased
- Bank & Loan statements for any loans not included in your data file
- Copies of all business bank and loan statements showing 30 June 2023 balances
- Purchase documents for any new properties (offer and acceptance and settlement statement)
- Insurance documents
- New/updated logbook for any partly personal vehicles
- Did you receive any Government Grants or Covid Relief Payments
- Wool on Hand as at 30 June 2023 \$ _____
- WAMMCO statement
- Livestock trading details

Numbers	SHEEP	CATTLE	OTHER
Opening Stock			
Purchases			
Natural Increase			
Total			
Sales			
Deaths			
Rations			
Closing Stock			
Total			

Personal Records

- Bank account details (only if you have changed them since the previous year)
- PAYG Payment summaries
- Interest, dividend and managed fund income details
- Rental property income and expenses (i.e., rental statements, loan statements)
- Purchase and sale documents of any assets sold during the year (i.e., shares, property)
- Work related expenses (i.e. union fees, donations, uniform, motor vehicle, income protection insurance)
- Private health insurance statement. These are now available through the ATO portal, but please advise us if there have been any changes
- Other information

Please return this form to Lincolns