



PRESTIGE PARTNERS
ADVISORY | SOLUTIONS | GROWTH

2026 Partnership Checklist

To assist us in preparing your partnership income tax return in accordance with Australian Taxation Office requirements, please use this checklist when you compile the information.

For income and deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit you will need to be able to substantiate the deductions claimed and income earned.

Finally, if you have sold any assets during the year please provide full details so we can determine whether Capital Gains Tax may apply to the transaction.

****DELIVERY UPON COMPLETION****

(Please tick preferred delivery method upon completion of your income tax return)

- ☐ Email to me (only applicable to clients who email or electronically send their tax information in to us)
- ☐ I will collect it from your office upon notification from you
- ☐ Post to me (I understand postage fees may apply)

FULL NAME OF PARTNERS:

First Name/s: _____ Surname: _____

First Name/s: _____ Surname: _____

Legal Name of Partnership: _____

Trading Name of Partnership: _____
(if different to Legal Name)

Preferred Contact Name: _____

Business Address: _____

Postal Address (if different to Business Address): _____

Email: _____

Telephone (W): _____ (H): _____ (M): _____

TFN: _____ ABN: _____

Is the partnership registered for GST? ☐ NO ☐ YES

Business Activity Description: _____



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- Did the Partnership have its business data on a bookkeeping software package?

☐ NO.

☐ YES. Please provide

☐ Data file (if applicable)

☐ Name of Software: _____ Version: _____

☐ Login ID (if applicable): _____

☐ Password (if applicable): _____

- Please provide the following documentation:

☐ Copy of ALL business bank account statements covering the period
1 July 2025 to 30 June 2026 inclusive

☐ Copy of ALL business credit card statements covering the period
1 July 2025 to 30 June 2026 inclusive

- Did the Partnership have any business loans?

☐ NO.

☐ YES. Please provide

☐ Copy of ALL business loan statements covering the period
1 July 2025 to 30 June 2026

☐ Loan #1: Reason for Loan is to _____

Business/investment portion of Loan : _____%

☐ Loan #2: Reason for Loan is to _____

Business/investment portion of Loan : _____%

- Did the Partnership employ staff?

☐ NO.

☐ YES. Please provide

☐ Copy of PAYG Payment Summaries issued

☐ Copy of Annual PAYG Payment Summary
Statement



- Did the Partnership buy, lease or hire any business assets between 1 July 2025 and 30 June 2026?

☐ NO.

☐ YES. Please provide

☐ Purchase contract, and/or

☐ Invoice/receipts

- Did the Partnership sell or scrap any business assets between 1 July 2025 and 30 June 2026?

☐ NO.

☐ YES. Please provide

☐ Sale contract, and complete the table below

Date Sold/Scrapped	Asset Number	Asset Description	Amount Received (if any)
1.			\$
2.			\$
3.			\$

- Did the Partnership have any stock on hand at 30 June 2026?

☐ NO.

☐ YES. Please complete the following

- Stock on Hand as at 30 June 2026 \$_____

- Did the Partnership write off any bad debts?

☐ NO.

☐ YES. Please complete the following

Name of Debtor	Amount written off
1.	\$
2.	\$
3.	\$
4.	\$



- Did the Partnership use a motor vehicle for business related purposes?

☐ NO.

☐ YES. Please select method of claim

☐ Business kms travelled: _____ km,

- Make & Model of Motor Vehicle: _____

OR

☐ Logbook method. Please provide logbook

- Did the Partnership have any debtors (i.e people who owe you money) as at 30 June 2026?

☐ NO.

☐ YES. Please complete the following

Name of Debtor	Amount outstanding (including GST)
1.	\$
2.	\$
3.	\$
4.	\$

- Did the Partnership have any creditors (i.e people you owe money to) as at 30 June 2026?

☐ NO.

☐ YES. Please complete the following

Name of Creditor	Amount outstanding (including GST)
1.	\$
2.	\$
3.	\$
4.	\$



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NEW CLIENTS ONLY

Please provide a copy of the following:

- | | | |
|--|-----------------------------------|-----------------------------|
| 1. 2025 Partnership Tax Return | ☐ Provided | |
| 2. 2025 Partnership Financials (if applicable) | ☐ Provided | ☐ NA |
| 3. Loan contracts for existing loans (if applicable) | ☐ Provided | ☐ NA |

I confirm that I have reviewed the above checklist and have supplied all the relevant information to prepare the 2026 partnership income tax return.

I also confirm that the above information is correct to the best of my knowledge and that where necessary I hold documentary evidence in support of my claims.

Dated the day of 20.....

.....
Signature of Partner

.....
Full Name of Partner