

BUSINESS CHECKLIST



SOFTWARE

- Access to Accounting Software i.e. XERO / MYOB

NO SOFTWARE

- Copy of Business Bank Statements (.csv format)
- Copy of Invoice Book (if applicable)

GENERAL DOCUMENTS

- Loan Documents
- Business Assets Purchased & Sold
- Business Related Receipts & Expenses
- Business-Related Vehicle Receipts & Logbook
- Business-Related Travel Expenses



FREE
Initial business session

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