

RESOURCE GUIDE

New Client Starter Checklist

Starting bookkeeping or working with us? Here's what to have ready.



Bookkeeping support built for local businesses — Karratha & the Pilbara

Starting with a new bookkeeper is easier when we've got the right information from the start. Here's what to have ready — having these on hand makes onboarding faster, smoother, and less back-and-forth for both of us.

Don't worry if you don't have everything on this list right away — we can work through it together. — **Thilini**

Your Getting-Started Checklist

Business Details

- ☐ ABN and registered business name
- ☐ Entity structure (sole trader, company, trust, or partnership)
- ☐ A brief description of your industry and the nature of your business

Access & Software

- ☐ Xero login access (or let us know if you'd like Xero set up for you)
- ☐ Access to connect your business bank account — see our "Connecting Your Bank to Xero" guide
- ☐ Any existing bookkeeping records (spreadsheets, exports from previous software)

Compliance Basics

- ☐ BAS Agent nomination through the ATO's Online services for business — see our nomination guide
- ☐ Your GST registration status and reporting cycle (monthly, quarterly, or annually)
- ☐ Insurance or WorkCover details, if you have employees

If You Have Employees

- ☐ Employee details, including TFN declarations and super fund choices
- ☐ Details of your current payroll software or process
- ☐ Any relevant award or employment agreement details

Handy Extras

- ☐ Copies of recent BAS lodgements or tax returns, if available
- ☐ Any outstanding ATO correspondence we should be aware of
- ☐ Contact details for your accountant, tax agent, or other advisors

Need a hand?

This checklist covers the essentials, but every business is a little different. If something on here doesn't apply to you, or you're not sure where to start, just get in touch and we'll sort it out together.

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Proudly supporting businesses across Karratha & the Pilbara