



PROFIT APPRAISAL

BUSINESS DETAILS

Legal Entity Type: _____

Name: _____

Location: _____

Email: _____

ABN: _____

GST: _____

Contact Person: _____

Email: _____

Phone: _____

Provide 3 years of profit & loss statements or provide the information below:
For each year:

1. Revenue amount	_____	_____	_____
2. Sales categories	_____	_____	_____
3. Highest category	_____	_____	_____
4. Cost of sales categories	_____	_____	_____
5. Cost of sales amount	_____	_____	_____
6. Gross Profit amount	_____	_____	_____
7. Total expenses amount	_____	_____	_____
8. Subcontractors amount	_____	_____	_____
9. Wages + super amount	_____	_____	_____
10.5 highest expense categories & amounts	_____	_____	_____
11. Net profit amount	_____	_____	_____
12. Any extraordinary trading information	_____	_____	_____

PROFIT APPRAISAL

GOAL

Revenue amount you want to make in next *12 months*:

Profit amount you want to make in next *12 months*:

Personal finance goal you want to hit in next *12 months*:

CURRENT SITUATION

What is your job estimating process?

How often do you look at reports?

Who currently keeps your accounts?

How often do you set goals?

How often do you review goals?

Are you tracking labour per job?

Do you know if you are profitable?

Any late compliance?

Taxes lodged for business and personal?

Email this Information to: kathi@tradiebooks.au

Call Kathi: 0421 604 401