**End of Financial year planning and prioritisation**

May and June are often busy periods for accounting technicians and BAS agents, but with some planning and prioritisation, the end of financial year workload can be manageable.

For some people, June brings a short respite before the end of the financial year workload. For others, the usual tasks for the month are no different, but the workload increases because of all the preparation required for EOFY tasks, particularly payroll.

If you haven't already scheduled your end-of-year tasks, start planning as soon as the March BAS is completed for your clients.

* Tax planning – if clients are not already in the habit of meeting with their tax agents before the end of the year, suggest they book a session for April or May to plan for the financial year’s tax obligations.
* Superannuation payments for tax deduction by 21 June – discuss with business owners how much extra to contribute to super.
* Payroll reconciliation – schedule time after the last pay run of June.
* STP finalisation must be done by 14 July.
* Stocktake on 30 June.
* Payroll tax annual reconciliation – remember to assess contractors and the 90 and 180 days rules.

**Set Your Priorities**

There's no doubt that no matter how well you plan your busy end-of-year workload, you will inevitably have to deal with unanticipated events and requests from clients.

How do you prioritise additional work on top of your scheduled workload?

Clients who have submitted information following your requests so you can complete non-negotiable work deadlines should get priority over the disorganised and tardy clients. Schedule the planned work into your calendar, and don't allow unexpected events to change that plan (at least not significantly).

Your weekly calendar may need to be slightly adjusted daily or weekly to allow for fluctuations in the time required for specific tasks. This is a natural part of effective working as an accounting technician, as we are regularly faced with tasks that turn out to be far more complex and time-consuming than we initially thought. However, unless you have a significant unforeseen event, you should have enough room to move in your weekly schedule to allow for variances in planned work.

Things get chaotic when you rearrange your entire week for a client who is making demands of you without any justification beyond the fact that they "want it now".

Some clients may not give you what you need by your deadlines yet expect you to do whatever you have to do to meet lodgement due dates. Therefore, you need to be clear and professional in your communications and let them know what you are prepared to do or not, as the case may be.

You don't need to rearrange your workflow to keep the noisy and demanding clients happy. This only creates stress and sets up a dynamic where the client can dictate your workload.

Of course, these principles don't just apply to the end of the financial year but all year round. You are in charge of your workflow, particularly at EOFY, when there are extra compliance tasks, and you need to look after yourself and maintain professional boundaries with your clients.

Your clients’ lack of planning does not have to become an emergency that derails your EOFY project plan.

[AAT End of Financial Year Resources](https://www.aat.org.au/AAT/AAT/Member_Resources/EOY__EOFY_resources.aspx)