

2026 Individual Income Tax Return Checklist

Please use this checklist to assist in gathering information for your income tax return.

Name:

Residential Address:

Postal Address:

Email Address:

Mobile:

Number of dependents:

Occupation title:
(if changed from 2025)

Bank details for tax refunds:
(if changed from 2025)

Account name:

BSB:

Account number:

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NAME:

INCOME	Information Provided	Not Applicable
Salary or Wages - Income Statement	☐	☐
Allowances, Earnings, Tips, Director's Fees etc...	☐	☐
Lump Sum Payments (E.g. Employment Termination Payment)	☐	☐
Australian Government Allowances & Payments	☐	☐
Services Australia Payments (Centrelink) – Youth Allowance etc..	☐	☐
Australian Annuities & Superannuation Income Streams	☐	☐
Partnership Distribution Statement (incl. copy of partnership tax return)	☐	☐
Trust Distribution Statement (incl. copy of Trust's tax return)	☐	☐
Dividend Statements	☐	☐
Gross Interest (bank statements & term deposit statements)	☐	☐
Employee Share Scheme Statements	☐	☐
Managed Fund Annual Tax Statements & Capital Gains Tax Statements	☐	☐
Capital gains/ losses made on the disposal of cryptocurrency	☐	☐
Capital gains/ losses made on the sale of property, shares, trusts etc. (include buy & sell contracts)	☐	☐
Foreign Income/Foreign Pensions	☐	☐
Rental Income (Please see attached rental worksheet)	☐	☐

WORK-RELATED DEDUCTIONS	Information Provided	Not Applicable
Work-Related Car Expenses:		
➔ If using the logbook method – provide copies of logbook, petrol receipts, servicing costs, insurance, registration, loan & interest costs. Purchase & sale of vehicle documents if applicable.	☐	☐
➔ If using the 'cents per kilometer' method – provide number of work-related kilometers & calculation.	☐	☐
Work -Related Travel Expenses	☐	☐
Work-Related Uniform Expenses – occupation specific, protective or compulsory work uniform costs (incl. laundry & dry cleaning)	☐	☐
Work-Related Self-Education Expense -	☐	☐
Continuing Professional Development Courses & Seminars	☐	☐
Professional Memberships/Subscriptions	☐	☐
Professional Journals/Trade Subscriptions	☐	☐
Details & Receipts for Home Office Expenses (see attached 'working from home' information)	☐	☐
Details of Depreciable Assets Purchased (e.g. Laptops, Phones & Other Office Equipment costing more than \$300)	☐	☐
Meal Allowance & Overtime Units	☐	☐
Union Dues & Fees	☐	☐

OTHER DEDUCTIONS	Information Provided	Not Applicable
Gifts & Donations (over \$2)	☐	☐
Costs Incurred in Managing Tax Affairs (E.g. Tax Agent Fees)	☐	☐
Income Protection Insurance Premiums (paid externally to your Superannuation Fund)	☐	☐
Additional Superannuation Contributions (including notice of intention to claim)	☐	☐
Costs incurred in earning interest, dividend and other investment income (e.g. investment advice fees)	☐	☐

RENTAL PROPERTY INFORMATION	Information Provided	Not Applicable
For new acquisitions, please provide details of the property purchase including settlement statement & statement of adjustments.	☐	☐
Gross Rental Income – provide rental agent statement if relevant	☐	☐
Percentage ownership of property	☐	☐
Number of weeks property was genuinely available for rent	☐	☐
Advertising for tenants	☐	☐
Body corporate Fees	☐	☐
Borrowing expenses – statements showing interest paid for the year	☐	☐
Cleaning costs & gardening costs & pest control costs	☐	☐
Details of repairs & maintenance	☐	☐
Insurance costs – e.g. building & landlord	☐	☐
Property agent fees & commissions	☐	☐
Water, electricity & gas charges	☐	☐
Council Rates	☐	☐
Purchase of new rental property assets – e.g. dishwasher, heater, oven etc..	☐	☐
Details of any major replacements or improvements to the property	☐	☐
Sundry rental expenses – e.g. stationery, phone usage, GST, bank fees & postage costs...	☐	☐

OFFSETS/REBATES & OTHER INFORMATION	Information Provided	Not Applicable
Superannuation contributions made on behalf of spouse	☐	☐
Spouse or De Facto partner's taxable income	☐	☐
Details of any dependants	☐	☐
Private Health Insurance details	☐	☐
Any other information you think is relevant	☐	☐

IF OPERATING AS A SOLE TRADER	Information Provided	Not Applicable
Detailed Summary of Income & Expenses or reports from accounting software – e.g. profit & loss, trial balance & balance sheet or spreadsheet.	☐	☐
Details of Single Touch Payroll information for employees (if relevant)	☐	☐
Details of business-related assets purchased	☐	☐
Details of any government grants, payments or rebates received	☐	☐
Details of any personal superannuation contributions made (including notice of intent to claim)	☐	☐
Any other information you think is relevant	☐	☐