

## 2026 INDIVIDUAL TAX RETURN CHECKLIST

- Please provide documents for any items below that apply to you. If you don't have all the documents, continue to attend your appointment and you can post, bring in, email or phone in the missing information.
- If you have income, deductions or special circumstances not listed below that you feel may affect your tax return, discuss it at the time of the appointment or contact us.
- Driver Licence or passport as proof of identity is required.

INCOME	INFORMATION PROVIDED	N/A
PAYG payment summaries (eg from employers)/ income statements	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract certificates for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>

WORK-RELATED DEDUCTIONS	INFORMATION PROVIDED	N/A
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>

OTHER DEDUCTIONS	INFORMATION PROVIDED	N/A
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance, or sickness and accident premiums	<input type="checkbox"/>	<input type="checkbox"/>
Additional super contributions including the notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>

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RENTAL PROPERTIES	INFORMATION PROVIDED	N/A
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income and expenses (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works or additions on the property	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information including the purchase and sale documents, solicitor fees, settlement sheets, agents commission and advertising, etc	<input type="checkbox"/>	<input type="checkbox"/>

OFFSETS/REBATES	INFORMATION PROVIDED	N/A
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Spouse or Defacto partner's income, date of birth and full name	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>	<input type="checkbox"/>

IF OPERATING AS A SOLE TRADER	INFORMATION PROVIDED	N/A
Details of Income & Expenses for the business including business bank/ Credit card statements. If using Accounting Software then send the invite	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Business Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries/income statements for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (eg trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions for self-employed persons including notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>

OTHER INFORMATION	INFORMATION PROVIDED	N/A
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>