

2026 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____

Information	Information provided	Not applicable
Income		
Income statement/PAYG payment summaries	☐	☐
Lump sum payments (eg employment termination payment)	☐	☐
Non-cash benefits	☐	☐
Partnership distribution statement, including copy of partnership tax return	☐	☐
Trust distribution statement, including copy of trust tax return	☐	☐
Documentation regarding foreign source income, foreign assets or property	☐	☐
Bank statements stating interest earned, including for term deposits	☐	☐
Dividend statements	☐	☐
Employee share scheme statements	☐	☐
Managed fund annual tax statement and capital gains tax statement	☐	☐
Buy/sell contract notes for any share transactions	☐	☐
Contracts to acquire/dispose of investments other than shares and rental properties	☐	☐
Records of crypto asset transactions	☐	☐
Work-related deductions		
Details of depreciable assets bought or disposed of during the income year (eg laptops)	☐	☐
Details and receipts for home office expenses, including a diary for working at home expenses	☐	☐
Details of working from home running expenses and receipts or time sheets	☐	☐
Professional journals/trade magazines	☐	☐
Professional memberships/subscriptions	☐	☐
Receipts for continuing professional development courses and seminars	☐	☐
Receipts for self-education expenses	☐	☐
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	☐	☐
Vehicle logbook for motor vehicle expenses (if using the logbook method or EV home charging rate)	☐	☐

Information	Information provided	Not applicable
Other deductions Receipts for donations of \$2 and over to deductible gift recipients Expenditure incurred in managing tax affairs (eg tax agent fees) Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees) Income protection insurance premiums	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐
Rental properties Date when property was purchased and settlement statement, including details of co-ownership if applicable Period property was rented out during the income year Records detailing rental income (annual statement from property agent, if engaging services of an agent) Loan statements for property showing interest paid for the income year Expenses incurred such as water charges, land tax and insurance premiums Details of depreciable assets bought or disposed of during the income year Details of any capital works on the property If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Offsets/rebates Spouse details, if applicable Details of any superannuation contributions for spouse Details of dependants, including their age, occupation and income Medicare levy exemption/reduction documents Private health insurance statement (and details of prepaid premiums)	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
If operating as a sole trader Cashbook, which includes records of drawings taken before the business takings were banked Copies of Business Activity Statements and/or Instalment Activity Statements lodged for the income year Copies of income statements/PAYG summaries for employees Details of any government grants, subsidies, payments or rebates received Details of superannuation contributions for employees Details of any assets purchased, including date of purchase and amount Payments of salaries and superannuation to associates Records from accounting software (eg trial balance, profit and loss, and balance sheet) Statements of all liabilities of the business	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Information	Information provided	Not applicable
Other information – all individuals		
Tax file number, date of birth, bank account details	☐	☐
Details of residency status	☐	☐
Other receipts or outgoings received or incurred, where uncertain if assessable/deductible	☐	☐
Personal super contributions made and notice of intent to claim deduction, if applicable	☐	☐
Individual's total superannuation balance	☐	☐

