

2026 Individual Tax Return Checklist

Our Tax Checklist has been designed to help you stay organised; ensure you have all the necessary information & maximise your eligible deductions this tax season.

Complete the checklist before your appointment & bring any relevant supporting documents. If you have any questions or would like assistance, please contact our office on **(03) 9435 4444**.

Name: _____ **Phone:** _____

Address: _____ **Email:** _____

Income

- | | |
|--|---|
| <input type="checkbox"/> Income statement/PAYG payment summaries | <input type="checkbox"/> Dividend statements |
| <input type="checkbox"/> Lump sum payments (e.g., ETP) | <input type="checkbox"/> Employee share scheme statements |
| <input type="checkbox"/> Non-cash benefits | <input type="checkbox"/> Managed fund tax/CGT statements |
| <input type="checkbox"/> Partnership distribution statement | <input type="checkbox"/> Share contract notes |
| <input type="checkbox"/> Trust distribution statement | <input type="checkbox"/> Other investment contracts |
| <input type="checkbox"/> Foreign source income/assets | <input type="checkbox"/> Crypto asset transactions |
| <input type="checkbox"/> Bank interest/Term deposits | |

Work-related Deductions

- | | |
|---|--|
| <input type="checkbox"/> Depreciable assets bought or disposed of | <input type="checkbox"/> CPD courses & seminars |
| <input type="checkbox"/> Home office expenses | <input type="checkbox"/> Self-education expenses |
| <input type="checkbox"/> WFH running expenses/time sheets | <input type="checkbox"/> Work-related deductions (tools, etc.) |
| <input type="checkbox"/> Professional journals/magazines | <input type="checkbox"/> Vehicle logbook |



Professional memberships

Other Deductions

Donations (\$2 & over)

Tax agent fees

Investment advice fees

Income protection premiums

Rental Properties

Rental purchase/settlement details

Rental income period

Rental income records – annual statement from the property agent

Rental loan interest statements

Rental property expenses

Rental depreciable assets

Capital works on rental

Rental disposal information

Offsets/Rebates

Spouse details

Spouse super contributions

Dependents details

Medicare levy documents

Private health insurance statement

Sole Trader

Sole trader cashbook

BAS/Instalment activity statements

Employee income statements/PAYG

Grants/subsidies received

Employee super contributions

Sole trader assets bought

Sole trader salaries/super to associates

Accounting software reports

Business liabilities



Other Information

- Tax file number/DOB/Bank details
- Residency status
- Other receipts/outgoings

- Personal super contributions
- Total superannuation balance