

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

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

Work-related Deductions

- | | |
|---|--|
| ☐ Depreciable assets bought or disposed of | ☐ CPD courses & seminars |
| ☐ Home office expenses | ☐ Self-education expenses |
| ☐ WFH running expenses/time sheets | ☐ Work-related deductions (tools, etc.) |
| ☐ Professional journals/magazines | ☐ 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