

2026 Income Tax Return Checklist – Individual (Client Version)

Instructions: Tick each item that applies. For each item selected, please provide the requested supporting documentation. If you are unsure whether an item applies, include the information and we will determine the correct tax treatment.

Employment & Pension Income

- PAYG Income Statement / Payment Summary (MyGov)
- Employer Share Scheme (ESS) statement
- Superannuation pension payment summary
- Government pensions, allowances and payments
- Director fees, bonuses and allowances
- Employment Termination Payments (ETPs)

Investment Income

- Interest income from bank accounts and term deposits
- Dividend statements from shareholdings
- Trust, managed fund and ETF annual tax statements
- Foreign income and overseas tax documentation
- Bond interest and peer-to-peer lending income
- Capital gains/losses from investments

Cryptocurrency

- Annual tax report from exchange/software
- Trading, staking, DeFi, NFT and airdrop transactions
- Wallet transaction records

Rental Property

- Annual rental agent statement

- Loan interest statements
- Council rates, water rates and land tax
- Property insurance
- Repairs and maintenance
- Capital improvements and renovations
- Strata/body corporate levies
- Advertising and management fees
- Gardening and other expenses
- Quantity surveyor depreciation report
- Personal-use percentage (if applicable)

Sale of Assets

- Settlement statements
- Purchase and cost-base records
- CGT withholding documentation
- Main residence sale details (where relevant)

Work Related Deductions

- Self-education expenses
- Professional memberships and union fees
- Professional journals and subscriptions
- Mobile phone and internet expenses
- Software and online subscriptions
- Protective clothing, uniforms and laundry

Work From Home

- Total hours worked from home

- Evidence of hours worked
- Home office equipment purchases
- Phone and internet usage records

Motor Vehicle

- Logbook (if applicable)
- Fuel, servicing, registration and insurance costs
- Cents-per-kilometre method business kilometres (max 5,000 km per vehicle)
- Details of any vehicle purchased or sold

Other Deductions & Offsets

- Income protection insurance premiums
- Charitable donations
- Investment account bank fees
- Personal super contributions and Notice of Intent acknowledgement
- Private health insurance statement

Changes During the Year

- Marriage, separation or divorce
- New dependent children
- Change in tax residency
- Property purchase or sale
- Business commenced or ceased
- Inheritance or significant gifts received

Bank Account Details for ATO Refund

BSB: _____

Account Number: _____