

Income Tax Return Checklist for 2025

Optio Accountants

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What you don't need to supply:

This data is available to us from the tax office.

However you should check your records to
your completed return when sent for signing

Payment Summaries/Income Statements for

Employment

Pensions and Government Benefits

Employment Termination Payments

Interest from bank accounts

Dividend statements from Australian Listed companies

HELP/HECS and student loan statements

Private Health Insurance Statement

OTHER INFORMATION REQUIRED

Bank Account for Deposit of Refund

BSB No.

Account No.

Spouse's Income

\$

Taxable Income

\$

Reportable Fringe Benefits

\$

Reportable Superannuation

\$

Investment Losses

\$

Rental Losses

What you do need to supply:

INCOME

YES NO

<input type="checkbox"/>	<input type="checkbox"/>	Annual Tax Report for distribution from trusts
<input type="checkbox"/>	<input type="checkbox"/>	Overseas income details
<input type="checkbox"/>	<input type="checkbox"/>	Life assurance & friendly society bonus details

<input type="checkbox"/>	<input type="checkbox"/>	Purchase & sale details in relation to rental properties, land, shares, etc. * contract dates & settlement statements for both sales & purchases * any other costs incurred
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<input type="checkbox"/>	<input type="checkbox"/>	Cryptocurrency Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Dividend re-investment records (Dates/Costs)

RENTAL PROPERTIES

No. of weeks available for rent

No. of weeks actually rented

<input type="checkbox"/>	<input type="checkbox"/>	Rental statement/s (from real estate agent) showing income and expenses
<input type="checkbox"/>	<input type="checkbox"/>	Expenses relating to rental property e.g. Rates, Insurance, repairs, Body Corporate fees

<input type="checkbox"/>	<input type="checkbox"/>	Loan statements
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**If a new rental property - contact us for a list
of additional items needed**

SPOUSE SUPERANNUATION CONTRIBUTIONS

<input type="checkbox"/>	<input type="checkbox"/>	Amount	\$ <input type="text"/>
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DEDUCTIONS (Receipts and diaries required)

YES NO

<input type="checkbox"/>	<input type="checkbox"/>	Motor vehicle expenses / Log Book: * Odometer readings at 01/07/24 _____ & 30/06/25 _____ Log book records If log book not available No. of kms for work purposes Personal vehicle details: * Make & Model _____ * Date of Purchase _____ * Purchase Price \$ _____ * Registration No. _____
<input type="checkbox"/>	<input type="checkbox"/>	Fuel, Repairs, Maintenance, Insurance, Registration, RACQ required if not claiming c/km method
<input type="checkbox"/>	<input type="checkbox"/>	Work related travel expenses - e.g. Toll fees, Parking, Fares, Taxi, Airfares, Accommodation, Car Hire, Meals
<input type="checkbox"/>	<input type="checkbox"/>	Uniforms & protective clothing, dry cleaning, repairs
<input type="checkbox"/>	<input type="checkbox"/>	Work related study expenses-e.g. Fees, Textbooks, Stationery, Photocopying, Kms travelled (log book)
<input type="checkbox"/>	<input type="checkbox"/>	Union fees, registrations, professional memberships
<input type="checkbox"/>	<input type="checkbox"/>	Other work related expenses -e.g. Tools, Stationery Seminars, Reference Books, Sun Protection
<input type="checkbox"/>	<input type="checkbox"/>	Stationery, replacement tools, equipment purchased
<input type="checkbox"/>	<input type="checkbox"/>	Home Office - Daily Diary + Bill for phone, NBN, Electricity or Home Office - actual bills plus floor area details
<input type="checkbox"/>	<input type="checkbox"/>	Computer and Equipment purchase
<input type="checkbox"/>	<input type="checkbox"/>	Interest & dividend deductions
<input type="checkbox"/>	<input type="checkbox"/>	Income protection insurance
<input type="checkbox"/>	<input type="checkbox"/>	Deductible superannuation contributions
<input type="checkbox"/>	<input type="checkbox"/>	Gifts & Donations - To Registered Australian Charities
<input type="checkbox"/>	<input type="checkbox"/>	Financial Planning fees for ongoing advice
<input type="checkbox"/>	<input type="checkbox"/>	Previous Tax Agent's fee (if not Optio Accountants)