



WRIGHTPARTNERS PTY LTD

ACCOUNTANTS AND REGISTERED TAX AGENTS

DIRECTOR

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2025 Individual Tax Return Checklist

Name of taxpayer: _____

Preferred contact no _____ Email: _____

Please ensure you have all the information needed to complete the Return, as having to put your Return aside can cause unnecessary delays in completion. The checklist is a guide to assist in this task, which although by no means exhaustive, should prove useful.

Information	Information Provided	Not Applicable
Income		
Income Statement (these are now accessible via the Tax Agent Portal. <u>Please ensure your employer has FINALISED your Statement, as we cannot lodge your Tax Return if Statement is unfinalised.</u>)	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (e.g. employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, and a copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, and a copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation regarding foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares & Crypto Currency (if any of these were sold)	<input type="checkbox"/>	<input type="checkbox"/>
Spouses Taxable Income	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Deductions		
Details of depreciable assets bought during the year (e.g. laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses and log of hours (Required for 2025) (Note: a sample period or average hours per week will no longer suffice)	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Internet or Telephone (portion of work related)	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information Provided	Not Applicable
Vehicle logbook for motor vehicle expenses (if using the logbook method), Electric Car details (logbook method), km's (if using cents per km method)	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions		
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (e.g. tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (e.g. investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Rental Properties		
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred such as water rates charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works on the property: Quantity Surveyor's Depreciation report.	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property	<input type="checkbox"/>	<input type="checkbox"/>
Offsets/Rebates		
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Other Information		
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>

To claim a work-related deduction:

- You must have spent the money yourself and weren't reimbursed.
- It must directly relate to earning your income.
- You must have a record to prove it. (Note: Bank & Credit Card Statements are insufficient records on their own).

NOTE: *To ensure that you will obtain the maximum deductions to which you are entitled, and in consideration of the penalty provisions, full details of any claims should be provided and supporting documentation be available. **Documentation must comprise receipts, dockets, diary notations and extensive details of any estimates.***