

2025 - 2026

ANNUAL TAX CHECKLIST – Individual



Please use this checklist and include with your accounting records to ensure that all relevant information is provided to enable us to complete your tax work.

Name of Taxpayer: _____

Address: _____

Contact No: _____

Email address: _____

GENERAL INFORMATION

ATTACHED

• Income

- Payment Summaries for any work performed or Details of employers to determine all information has been lodged with ATO
- Details on allowances, directors fees etc earned
- Dividend information (copies of dividend advices)
- Managed funds (copies of Annual Tax Statements)
- Interest received on personal bank accounts (copies of statements)
- Any other income received – Digital Currencies – Purchase/Trading

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• Deductions

- Work related expenses (copies of receipts)
- Work related car expenses (PLEASE NOTE: Motor Vehicles are now limited to the logbook method or 5000km business use) – **ATO AUDIT TARGET**

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CAR

Make/Model: _____

Rego: _____

Main Driver: _____

Opening + Closing Speedo: _____

- Superannuation contribution amount, policy number and copy of Notice of Intent Acknowledgement of Deduction by Superannuation Fund

Please note that tax returns CANNOT be lodged without this acknowledgment of claiming a tax deduction. ATO Data matching in this area has increased.

- Donations (Copies of receipts)
- Self education expenses (Copies of receipts)
- Receipts for purchase of uniforms/ protective clothing, laundry or dry cleaning – **ATO AUDIT TARGET**
- Income protection (Annual premiums paid)

• Private Health Cover

- Include a copy of your Annual Health Cover statement as issued by your private health cover provider – required prior to lodging tax return.

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• Rental Properties

- Income details or property agent statements
- Details on loans, showing interest on rental property
- Expenses relating to rental property
- Quantity Surveyors tax depreciation report (if applicable)
- Period of rental for 2025-26
- Address of Rental Property/s
- If purchased or sold during 2025-26, copies of settlement statement & contract
- If you have not previously supplied WCC with your purchase details, please provide them for us to keep on file for future capital gains tax purposes

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- **Capital Gains / Losses**

- Details of shares or units purchased and sold during the year
- Details of other assets purchased and sold during the year

- Other

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- Distributions from partnerships and/or trusts
- Net income or loss from business

NOTES:

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