

2026 Individual Tax Return Checklist

Name: _____

Address: _____

Preferred Contact No: _____ **Email:** _____

Employers are required to finalise their PAYG summaries by 14th July.

ATO will receive interest, dividend and private health information near the end of August.

Information	
Income	
❖ Interest earned, including term deposits. ❖ Dividend statements. ❖ Managed fund annual tax and capital gains statements. ❖ Sale and purchase details for any shares sold. ❖ Records of cryptocurrency transactions. ❖ Contracts to acquire/dispose of investments other than shares or rental properties.	❖ Employee share scheme statements ❖ Non-cash benefits. ❖ Partnership distribution statement, including a copy of partnership's tax return. ❖ Trust distribution statement, including copy of trust's tax return. ❖ Documentation regarding any foreign source income, assets or property.
Work-related Deductions	
❖ Receipts for work related deductions such as protective clothing, uniform expenses, tools & equipment and travel expenses. ❖ Details for home office expenses and records of number of hours worked from home. ❖ Work-related kms using private vehicle (c/km method). ❖ Motor vehicle expenses eg fuel, registration, insurance, repairs, interest (logbook method).	❖ Details of work-related depreciable assets purchased or sold. ❖ Professional journals/trade magazines. ❖ Professional memberships/subscriptions. ❖ Receipts for continuing professional development courses. ❖ Receipts for self-education expenses.
Other Deductions	
❖ Receipts for donations over \$2 to deductible gift recipients. ❖ Notice of superannuation contributions. ❖ Expenditure incurred in managing tax affairs.	❖ Expenditure incurred in earning dividends and other investment income (eg investment advice fees). ❖ Income protection insurance premiums.
Rental Properties	
❖ Records detailing rental income (annual statement from property agent if using one) ❖ Loan statements or interest paid for year. ❖ Expenses such as water charges, insurance, land tax, body corporate fees. ❖ Details of depreciable assets purchased or sold.	❖ Details of any capital work done to the property. ❖ If property purchased, date and ownership details. ❖ If property sold, information relating to ownership, date sold, and costs associated with disposal of the property.
Offsets/Rebates	
❖ Details of any superannuation contributions for spouse. ❖ Details of dependents.	❖ Private health insurance statement (including details of prepaid premiums).