



HAMPTON PARTNERS

—Bridgetown - Boyup Brook - Nannup—

INDIVIDUAL INCOME TAX CHECKLIST 2026

NAME: _____

RESIDENTIAL ADDRESS: _____

POSTAL ADDRESS: _____

EMAIL: _____

DOB: _____ PHONE: _____ OCCUPATION: _____

PARTNER'S NAME: _____ PARTNER'S DOB: _____ PARTNER'S INCOME: _____

PREFERRED METHOD OF CONTACT/CORRESPONDENCE: Phone ☐ Post ☐ Email ☐
(Authority Required)

PAYMENT

☐ Pay on Day (with discount)

EFTPOS FACILITIES ARE AVAILABLE

Payment of your fee can be made via direct debit or EFTPOS

BANK DETAILS FOR ATO REFUNDS:

Account Name: _____ BSB: _____ Account No: _____

TO COMPLETE YOUR 2026 INCOME TAX RETURN WE WILL REQUIRE THE FOLLOWING INFORMATION WHERE RELEVANT

- ☐ Are you an Australian Resident for tax purposes? Yes ☐ No ☐
- ☐ Details of any **SALARY** and **WAGE INCOME**, both Australian and Foreign.
- ☐ Details of any income from a **SUPERANNUATION FUND**
- ☐ Have you made a **SUPERANNUATION CONTRIBUTION** during the year which you wish to claim as a tax deduction?
(Please provide copy of Super Fund section 290-170 Acknowledgement Notice)
- ☐ Did you receive any **Centrelink Income**? Yes ☐ No ☐
- ☐ **INTEREST DETAILS:** Please provide a summary below or copies of statements for each account.

Acc Name	Joint Acc Y/N	BSB	Acc No	TFN Tax	Interest Earned

- ☐ Details of any **DIVIDENDS** and/or **MANAGED INVESTMENTS**? (Please include dividend/ distribution notices)
- ☐ Details for any **RENTAL PROPERTY TRANSACTIONS** (Please see Rental Checklist available on our website)
- ☐ Details of any **Capital Gains / Losses** (e.g. Property, Shares, and/or crypto currency transactions, other substantial assets)
(Please provide CHESS Statements, Buy & Sell Contracts, Offer & Acceptance and Settlement statement if not previously provided)
- ☐ Did you receive income from a **BUSINESS**? Yes ☐ No ☐ (Please complete separate Business Checklist available on our website)
- ☐ Details of any **OTHER INCOME** not already disclosed (e.g. foreign pension / foreign employment)
- ☐ Do you own overseas assets with a value greater than \$50,000 Yes ☐ No ☐

WORK RELATED EXPENSES

☐ **TRAVEL EXPENSES** (e.g. Airfare, Accommodation, Car Hire, Meals and Incidentals) Yes ☐ No ☐ - (If yes, More information required)

☐ **MOTOR VEHICLE CLAIM** There are two claim methods available.

1. You can claim up to 5,000km at 88c per km for 2026 2. Logbook with 12 consecutive weeks recorded

Vehicle	Owner's Name	Business Use % (as per logbook)	30 June Odometer Reading

☐ **UNIFORM, PROTECTIVE CLOTHING AND/OR SUN PROTECTION EXPENSES** (Purchase, Laundry and Maintenance)

☐ **SELF EDUCATION EXPENSES** (Seminars, Books, Depreciation Items etc.)

Course title: _____ Institution attended: _____

Is this for current employment Yes ☐ No ☐ OR Future Employment Yes ☐ No ☐

☐ **TELEPHONE / MOBILE / INTERNET** and percentage work related (Not available if home office set rate used & please provide invoices and claim calculation)

☐ **OTHER EXPENSES** not already mentioned (plus percentage of work related use)

(e.g. Union Fees, Home Office, Tools, Reference Materials, Accounting fees, Subscriptions, Donations, Income Protection)

Details	Amount

☐ **Home office hours. A log is required for this claim.** Yes ☐ No ☐

☐ Do you **PAY** Child Support? Yes ☐ No ☐ Amount of **CHILD SUPPORT** you **paid** during the year \$ _____

ZONE OFFSET

☐ Did you reside in a remote zone? _____

Where did you reside? _____ Period resided: _____

☐ **PRIVATE HOSPITAL INSURANCE.** Are all family members covered? Yes ☐ No ☐ **Is the policy for Ancillary cover only?**

NOTE

SUBSTANTIATION OF WORK RELATED EXPENSES - Please note that under the substantiation rules a claim can only be made for those expenses which can be supported by an invoice/receipt and that under ATO audit, invoices/receipts which are unreadable or do not give full details of the purchases are excluded from being a deduction.

RETENTION OF RECORDS -

We recommend that you retain all records and documentation for at least **5 YEARS AFTER ASSESSMENT** of your Income Tax Return.

Taxpayer's Signature

Date

PLEASE RETURN THIS COMPLETED FORM WITH YOUR TAX DOCUMENTS

Bridgetown Office
116 Hampton Street, (PO Box 48)
Bridgetown WA 6255
Phone: (08) 9761 1236
Email: admin@hpb.com.au

Boyup Brook Office
21 Bridge Street, (PO Box 118)
Boyup Brook WA 6244
Phone: (08) 9765 2999
Email: adminbbk@hpb.com.au

Nannup Office
67 Warren Road,
Nannup WA 6275
Phone: 0437 325 299
Email: admin@hpb.com.au

www.hpb.com.au