

2026 TAX RETURN INDIVIDUAL CHECKLIST



SURNAME:

FIRST NAME:

OTHERS:

ADDRESS:

SUBURB:

POSTCODE:

HOME TEL NO:

WORK TEL NO:

MOBILE TEL NO:

EMAIL:

TFN:

ABN:

DOB:

SPOUSE NAME:

TFN:

DOB:

HOW WOULD YOU LIKE YOUR TAX RETURN SENT TO YOU ON COMPLETION FOR SIGNING?

☐ EMAILED (PDF)
 ☐ POSTED
 ☐ INTERVIEW
 ☐ SIGNNOW (DIGITAL)

IS ASCENT PREPARING SPOUSE TAX RETURN? YES ☐ OR NO ☐

INCOME

- | | |
|--|---|
| ☐ Gross salary, wages, earnings, allowances, benefits, tips and directors' fees | ☐ Distributions from partnerships and trusts including managed funds |
| ☐ Job Description: _____
Job Description: _____ | ☐ Details of any capital gains or losses incurred from the sale of CGT assets such as shares and property (this includes dates and values of acquisitions and disposals) |
| ☐ Any ABN income (if so, need ABN, type of work completed and any GST charged) | ☐ Rent received from investment properties (complete attached Rental Property Checklist) |
| ☐ Lump sum and termination payments | ☐ Details of any foreign source income |
| ☐ Government and Centrelink payments including pensions and allowances | ☐ Details of any employee shares received (need share documentation) |
| ☐ Annuities or other pensions such as account based pensions | ☐ Details of any Buy/Sells of Cryptocurrency ie Bitcoin, Ethereum, Ripple etc |
| ☐ Interest earned on any bank accounts including ATO refund interest | |
| ☐ Dividends received or reinvested including any franking credits attached | |

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DEDUCTIONS

(Please provide a summary of expenses. You must have receipts to substantiate if total claims are more than \$300)

WORK RELATED EXPENSES

- ☐ Did you use your motor vehicle for work? If so:
Total kms for work _____
Make/Model of Vehicle _____

- Must keep 4 week diary if claiming cents per km method

3 month logbook kept: YES ☐ No ☐

- ☐ Did you keep a record of actual expenses (provide summary of actual expenses and **must supply** a 3 month logbook)
- ☐ Other unclaimed work related travel expenses such as taxi's, public transport and bridge tolls
- ☐ Purchase of compulsory uniforms and protective clothing including laundry costs for work related purposes
- ☐ Self education expenses including fees, books, stationery, travel and parking
- ☐ Union fees and memberships to industry and professional organisations
- ☐ Purchase of sun protection, hats, sunglasses and sunscreens for work related purposes
- ☐ Purchase of tools or trade equipment for work related purposes
- ☐ Telephone expenses for work related calls (make sure 4 week diary has been kept for a percentage)
- ☐ Meal allowance
- ☐ Seminar/course fees and travel for seminars, conferences and conventions
- ☐ Books, journals, subscriptions and professional library

- ☐ Home office setup expenses such as depreciation on purchase of equipment e.g. computer, telephone, fax and furniture. Details of home office running expenses such as heating, cooling, lighting and cleaning (need home office area %)

- ☐ Home office hours. Need to keep a daily log to substantiate cents per hour claim for the year

- ☐ Computer expenses including internet costs, hardware, software and percentage used for work

INVESTMENT RELATED EXPENSES

- ☐ Motor vehicle expenses for investment related travel including investment related kms travelled
- ☐ Telephone accounts for investment related calls
- ☐ Seminar and course fees and travel for investment seminar, conferences and conventions
- ☐ Interest paid and fees charged on money borrowed for investments
- ☐ Bank fees incurred on investment related activities and accounts

GENERAL EXPENSES

- ☐ Donations to registered charities for \$2 or more
- ☐ Tax preparation fees including travel to your tax agent
- ☐ Income protection insurance if paid by you (we need end of year summary letter)
- ☐ Tax deductible contributions into superannuation (Acknowledgement letter required from Superfund)
- ☐ Any personal contributions into superannuation

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TAX OFFSETS & REBATES

- ☐ Number of Dependent Children: _____
- ☐ Dependant rebates (if you have dependants including spouse, children, and parents or parents in law, please provide their details including name, date of birth and their income. Please confirm if you are in receipt of Family Tax Benefits)
- ☐ Zone rebate if you lived in a remote area during the year, the number of days and where you resided
- ☐ HELP debt statement/balance owing
- ☐ Spouse income (if Ascent is not doing)
- ☐ Spouse Super Contribution made on behalf of spouse

RENTAL PROPERTY

- ☐ Total rental income earned including bond money retained due to damage or in place of rent and insurance payouts (If using agent please provide agent reports)
- ☐ All rental expenses
- ☐ If the property has more than 1 owner, the percentage of your share
- ☐ Tax depreciation schedule (deductions for decline in value of depreciating assets, capital works deductions)
- ☐ If you purchased rental during the year, we require:
 - Offer & Acceptance
 - Settlement statement
 - Bank loan setup fees
- ☐ Loan statements 1/7 - 30/6

ELECTRONIC FUNDS TRANSFER

Electronic Funds transfer – all tax refunds will only be paid by the ATO electronically and therefore we will require your bank account name, BSB and account number to process any tax refunds.

ACCOUNT NAME:

BSB:

ACCOUNT NUMBER:



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