



**IEC ADVISORY**  
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## 2025 Individual Income Tax Return Checklist

**Name:** \_\_\_\_\_

Individual Details – Please provide evidence	Yes	No	Unsure
<b>Did you have a spouse for the 2025 Financial Year?</b> If yes, please answer the following: Name: Spouse's Date of Birth: Spouse's Taxable Income:			
<b>Did you have a change in marital status during the income year?</b>			
<b>Do you have any dependents living with you?</b> If yes, please list the number of dependents you have:			
<b>Did you buy or sell any property or capital assets during the income year?</b> (e.g. shares, rental property, main residence) If yes, please provide details:			
<b>Superannuation</b> Could you please provide yours and your spouse's most recent superannuation statement.			
<b>Did you or your spouse make any concessional contributions towards your Superannuation Fund for the 2025 Financial Year?</b> If yes has this been lodged with your superannuation fund? If you have contributed funds, have you completed the Notice of Intent to claim form and please provide the acknowledgement of receipt of the notice, that the fund would have provided you.			
<b>Did you and your spouse/dependents have any Personal Insurance (Life/Total and Permanent Disability and or Income Protection) in place for the 2025 financial year?</b> If yes, could you please provide the annual statement provided by your Insurance Provider			
<b>In the case of a refund please provide your following bank details (only if different to prior years).</b>  <b>Name:</b> <b>BSB:</b> <b>Account Number:</b>			

**Part B –** *(Please tick the relevant box and provide copies of documentation to support this)*

<b>Income – please provide evidence</b>	<b>Yes</b>	<b>No</b>	<b>Unsure</b>
<b>Income</b>			
<b>Gross Interest</b> If yes, please provide a summary of the interest earned for each bank account for the financial year.			
<b>Dividends</b> If yes, please provide your dividend statements for the year.			
<b>Distributions from Partnerships and / or Trusts</b> If yes, please provide relevant documentation ( <i>distribution statements</i> ).			
<b>Personal services Income (PSI)</b> Did you receive income under your ABN which was for the provision of personal services? ( <i>e.g. Where labor component of contract is &gt;50% this is an indicator of personal services income</i> ) If yes, please provide advise our firm so we can contact you to ensure we request the appropriate information.			
<b>Net income or loss from your business (as a sole trader)</b> If yes, please provide a summary of your income and expenses.			
<b>Rental</b> If yes, please refer to our <a href="#">2025 Rental Checklist</a> to help ensure that you include all relevant documents.			
<b>Other income</b> ( <i>please specify below</i> ):			



Deductions – <i>please provide evidence</i>	Yes	No	Unsure
<b>D1. Work Related Car Expenses</b>			
<b>Cents per kilometre method</b> ( <i>up to a maximum of 5,000 work related kms</i> ) If yes, you will need to provide some form of record to show the trips that you were required to make for work purposes			
<b>Logbook method</b> If yes, please provide a copy to our firm (of both the logbook and summary of all of your motor vehicle expenses).			
<b>D2. Work Related Travel Expenses</b>			
<b>Employee domestic travel with a reasonable travel allowance</b> If yes, please provide the receipts for your expenses			
<b>Employee without a reasonable travel allowance</b> Other work-related travel expenses ( <i>if yes please provide receipts and proof that you have incurred the expense, ie bank statements</i> )			
<b>D3. Work Related Uniform and other Clothing Expenses - (<i>If yes, please provide relevant receipts</i>)</b>			
Protective Clothing			
Occupation Specific Clothing			
Uniform			
Dry Cleaning Expenses			
Other Claims ( <i>please specify below</i> ):			
<b>D4. Work Related Self-Education Expenses - (<i>If yes, please provide relevant receipts</i>)</b>			
<b>Course taken at Educational Institutions:</b>			
Course fees			
Books & Stationery			
Other ( <i>please specify below</i> ):			



Deductions – <i>please provide evidence</i>	Yes	No	Unsure
<b>D5. Other Work-Related Expenses - Working from Home Expenses</b>			
<b>Please note there have been legislative changes to the way “Working from Home Expenses” are claimed.</b> <i>(Please see below for a short summary or <a href="#">click here for a detailed fact sheet</a>)</i>			
<p>When evidencing the <b>total number of hours worked</b> during an income year, taxpayers are required to keep a record (e.g., a diary) showing the total number of hours they worked from home during the year, as follows:</p> <p>a) For the <b>2024 and later income years</b> – an individual needs to keep a record for the entire income year of the number of hours they worked from home during that year.</p> <p>This means that <b>from 1 July 2023</b>, the <b>ATO will no longer accept an estimate</b> of hours worked, based on the number of hours worked from home during a particular period (e.g., for a four week period) and applied to the rest of the income year.</p> <p>A <b>record</b> of hours worked from home can be used in the form of timesheets, rosters, time tracking apps, or a diary or similar document.</p>			
<b>Electricity</b> <p>If you were working from home, we can claim Electricity costs under either the ATO’s revised fixed rate method <b>OR</b> the Actual cost method.</p> <p>If you could like us to assess the actual cost method, please provide a copy of your electricity bills for the relevant period and details of the hours worked.</p> <p>Alternatively, under the revised fixed rate method we will need the diary of hours worked as referenced above.</p>			
<b>Internet</b> <p>If you were working from home, we can claim Internet costs under either the ATO’s revised fixed rate method <b>OR</b> the Actual cost method.</p> <p>If you could like us to assess the actual cost method, please provide a copy of your Internet bills for the relevant period and details of the hours worked.</p> <p>Alternatively, under the revised fixed rate method we will need the diary of hours worked as referenced above.</p>			
<b>Telephone</b> <p>If you were working from home, we can claim Telephone costs under either the ATO’s revised fixed rate method <b>OR</b> the Actual cost method.</p> <p>If you could like us to assess the actual cost method, please provide a copy of your Telephone bills for the relevant period and details of the hours worked.</p> <p>Alternatively, under the revised fixed rate method we will need the diary of hours worked as referenced above.</p> <p><i>(continued over page)</i></p>			



Deductions – Please provide evidence	Yes	No	Unsure
Stationary and Computer Consumables (e.g. printer ink and paper) If you were working from home, we can claim Stationary and Consumables costs under either the ATO's revised fixed rate method <b>OR</b> the Actual cost method.  If you could like us to assess the actual cost method, please provide a copy of your stationary and computer consumables receipts for the relevant period and details of the hours worked. Alternatively, under the revised fixed rate method we will need the diary of hours worked as referenced above.			
<b>D5. Other work-related expenses</b> – <i>(If yes, please provide relevant receipts)</i>			
Subscriptions and Union Fees			
Tools and Equipment including office furniture			
<b>Other types of deductions</b> – <i>(If answered yes please provide relevant receipts)</i>			
D7. Interest Deductions			
D8. Dividend Deductions			
D9. Gifts or Donations			
D10. Cost of Managing Tax Affairs			
D12. Personal Superannuation Contributions			
D15. Other Deductions <i>(please specify):</i>			

Additional Notes – Is there anything you would like to ensure we are aware of?

Signed: \_\_\_\_\_

Date: \_\_\_\_\_