# 2026 Individual Tax Return Checklist

## Tax Time is Here

As we prepare your 2026 Income Tax Return, now is a great time to gather your information. Having your records organised helps ensure you claim every deduction you are legally entitled to while meeting Australian Taxation Office (ATO) record-keeping requirements.

Remember:

- Keep receipts, invoices and tax invoices
- Most records should be retained for at least 2 years
- Only claim expenses you have paid yourself and that relate to earning your income
- If an expense is partly private, only the work-related portion is deductible

### Documents to Bring

☐ Driver licence/Form of ID (New Identification Requirements for Tax Agents from 1 July 2026)
☐ Bank account details for your refund
☐ Private health insurance statement
☐ Investment statements
☐ Rental property annual summary
☐ Loan statements
☐ Receipts for deductions
☐ Logbook (if claiming motor vehicle expenses)
☐ Working from home records

---

## Income Information

Please provide details of all income received during the year, including:

☐ PAYG Income Statements (if not available through the ATO)
☐ Government payments
☐ Interest earned from banks and financial institutions
☐ Dividends from shares
☐ Managed fund distributions
☐ Rental property income
☐ Business or sole trader income
☐ Foreign income
☐ Cryptocurrency transactions
☐ Capital gains from the sale of investments or property

---

#### Is an expense deductible?

If you are unsure whether an expense is deductible, simply include the information with your tax records. We are happy to review your circumstances and advise what can be legally claimed under current tax law.

Our aim is to ensure you receive every deduction you are entitled to while remaining fully compliant with ATO requirements.

# Deduction Information

### Vehicle and Travel

☐ Motor vehicle expenses
☐ Work-related parking and tolls
☐ Taxi, rideshare and public transport
☐ Airfares and accommodation for work travel
☐ Travel diary (where required)

*Note: Home-to-work travel is generally not deductible*

### Working From Home

If you worked from home during the year, you may be able to claim eligible expenses.

Examples include:

☐ Hours worked from home
☐ Electricity and gas
☐ Internet
☐ Mobile phone
☐ Computer consumables
☐ Office furniture
☐ Computer equipment
☐ Repairs and maintenance

Please retain records of hours worked and supporting documentation.

### Clothing and Laundry

☐ Compulsory uniforms
☐ Occupation-specific clothing
☐ Protective clothing
☐ Laundry expenses
☐ Dry cleaning

### Tools and Equipment

☐ Computers
☐ Laptops
☐ Tablets
☐ Mobile phones
☐ Tools
☐ Safety equipment
☐ Briefcases or work bags
☐ Office furniture

### Self-Education

☐ Course fees
☐ Textbooks
☐ Stationery
☐ Student amenities
☐ Internet used for study
☐ Travel to education
☐ Professional journals

### Professional Expenses

☐ Professional memberships
☐ Union fees
☐ Registration and licensing fees
☐ Professional indemnity insurance
☐ Conferences and seminars
☐ Training courses
☐ Continuing professional development

### Other Work Expenses

☐ Home office equipment
☐ Work-related subscriptions
☐ Reference books
☐ Technical publications
☐ Protective equipment
☐ Sunscreen, hats and sunglasses
☐ Income protection insurance (held personally)
☐ Telephone expenses
☐ Internet expenses
☐ Work-related postage
☐ Bank fees relating to investment income

### Investment Deductions

If you own investments, please provide details of:

### Shares

☐ Interest on investment loans
☐ Investment advice fees
☐ Dividend statements
☐ Share purchase and sale contracts

### Rental Properties

☐ Managing Agent Statement
☐ Loan interest
☐ Council rates
☐ Water rates
☐ Insurance
☐ Repairs and maintenance
☐ Property management fees
☐ Body corporate fees
☐ Advertising for tenants
☐ Gardening
☐ Pest control
☐ Cleaning
☐ Depreciation schedules
☐ Capital improvements completed during the year

### Donations

☐ Donations of $2 or more made to registered deductible gift recipients (DGRs)

### Superannuation

☐ Personal superannuation contributions
☐ Notice of Intent to Claim acknowledgement
☐ Spouse contributions

### Tax Offsets and Rebates

Please advise if you:
☐ Have private health insurance
☐ Dependents

### Other Information

Please let us know if you:
☐ Purchased or sold property
☐ Purchased or sold cryptocurrency
☐ Bought or sold shares
☐ Started receiving a pension
☐ Received an insurance payout
☐ Received an employment termination payment
☐ Changed jobs
☐ Started or ceased a business
☐ Became an Australian resident or ceased residency
☐ Married, separated or divorced during the year