



CHARTERED
ACCOUNTANTS

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2026 Individual Income Tax Return Checklist

This checklist is designed as a guide for the preparation of your personal income tax return. Completing this checklist will ensure we have all the relevant information required to prepare your personal income tax return quickly and efficiently.

Some items listed may not apply to your situation or you may want to contact us to clarify.

Name				
Address				
Postal (if different)				
Contact Numbers	Mobile		Home	
	Work		Fax	

Email Address			
Do you want correspondence by email or mail (please check the box)		Email	Mail

Occupation			
The following 2 items are only required if this is the first year we are preparing your return			
Date of Birth		Tax File Number	Please don't email this to us

Spouse (if we don't prepare their tax return)	Name	
	Date of Birth	
	Annual Income	

Names of any dependent children	Date of birth	Name

Bank Account	From 1 July 2013, individual tax refunds are required to be paid directly into your bank account		
Account Name			
BSB		Account	

INCOME

Have you received any of the following payments?		Amount / details
Salary or wages	Yes / No	
Allowances, earnings, tips, director's fees etc	Yes / No	
Employer lump sum payments	Yes / No	
Employment termination payments	Yes / No	
Australian Government allowances and payments like newstart, and austudy	Yes / No	
Australian Government pensions and allowances	Yes / No	
Australian annuities and superannuation income streams and pensions	Yes / No	
Interest	Yes / No	
Dividends	Yes / No	
Employee share schemes	Yes / No	
Distributions from partnerships and/or trusts	Yes / No	
Net income or loss from business	Yes / No	
Capital gains, ie sale of shares	Yes / No	
Foreign source income	Yes / No	
Rent (please complete rental checklist)	Yes / No	
Any other income not listed above (please specify)	Yes / No	
Comments or Questions:		

DEDUCTIONS

Have you incurred any of the following for work? (remember you will need to keep records to substantiate)		Amount / details
Work related car expenses (one of the following):		
cents per kilometre method (up to a maximum of 5,000 kms)	Yes / No	
If you travel more than 5,000km for work then you must use the logbook method	Yes / No	To claim please complete the motor vehicle checklist
Work related travel expenses, ie taxi's	Yes / No	
Work related uniform and protective clothing expenses	Yes / No	
Work related self-education expenses	Yes / No	
Other work-related expenses:		
Telephone/mobile phone	Yes / No	Annual cost \$ _____, work _____ %
Internet	Yes / No	Annual cost \$ _____, work _____ %
Tools and equipment	Yes / No	
Subscriptions and union fees	Yes / No	
Computer and software	Yes / No	Annual cost \$ _____, work _____ %
Journals/periodicals	Yes / No	
Sun protection products (i.e., sunscreen and sunglasses)	Yes / No	
Seminars and courses	Yes / No	
Home office expenses (number of hours working from home)	Yes / No	
Other types of deductions:		
Interest deductions	Yes / No	
Dividend deductions	Yes / No	
Gifts or donations	Yes / No	
Cost of managing tax affairs	Yes / No	
Income Protection Insurance	Yes / No	
Comments or Questions:		

OTHER		Amount / details
Have you lived in a remote or isolated area of Australia? Where and how long?	Yes / No	
Do you have a dependent spouse or parent?	Yes / No	
Did you or your spouse receive FTB through the Family Assistance Office?	Yes / No	
Medicare levy reduction or exemption certificate if applicable	Yes / No	
Did you have private health insurance 'Hospital Cover'? If so	Yes / No	If yes, we have access to this online
Did you make superannuation contributions on behalf of your spouse?	Yes / No	
Do you have a HELP liability or a student financial supplement loan debt?	Yes / No	
Medical Expenses, please note for the 2020 and future years you are no longer able to claim the medical expenses rebate.		
Comments or Questions:		

I declare that:

1. I have instructed you to prepare my income taxation return for the year ended 30 June 2026.
2. I have disclosed, and you have returned, all of the income including net capital gains which I have earned/received, for the 2026 income year.
3. All income declared, claims for deductions and tax offsets/rebates included in my return are based on my specific instructions and advice that I satisfy the relevant taxation requirements.
4. I have all receipts or documentation necessary to substantiate the above claims and I will make them available if required by the Tax Office.
5. We acknowledge and accept the terms of engagement for the reparation of our return which is detailed on our website.

Signature

Date/...../.....