



## 2025/2026 INDIVIDUAL TAX RETURN CHECKLIST

### INFORMATION WE REQUIRE TO PREPARE YOUR TAX RETURN

**INCOME:** *The tax office will provide us with majority of your income.*

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|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> PAYG Payment Summaries, DHHS Income,     | <input type="checkbox"/> Rental Income - <i>refer to separate worksheet</i>                                                                   |
| <input type="checkbox"/> Other pensions and/or annuities;         | <input type="checkbox"/> Details of any assets sold - Shares, Property &/or<br>Cryptocurrency ( <i>provide the purchase &amp; sale docs</i> ) |
| <input type="checkbox"/> Dividend & Interest Income, ESS Income & | <input type="checkbox"/> Income Protection claims received                                                                                    |
| <input type="checkbox"/> Managed Fund Trust Distributions         |                                                                                                                                               |

### DEDUCTIONS:

- |                                                                                                                             |                                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Tools of Trade (if over \$300 we need date of purchase)                                            | <input type="checkbox"/> Stationery items                                                    |
| <input type="checkbox"/> Professional Memberships & Union Fees                                                              | <input type="checkbox"/> Donations                                                           |
| <input type="checkbox"/> Travel - work related (include, Tolls, Parking,<br>Accommodation, expenses not reimbursed by work) | <input type="checkbox"/> Telephone (work related) - mobile & % home ( <i>if applicable</i> ) |
| <input type="checkbox"/> Subscriptions - periodicals                                                                        | <input type="checkbox"/> Income Protection Insurance                                         |
| <input type="checkbox"/> Training - conferences, seminars                                                                   | <input type="checkbox"/> Sun protection items (if you work outdoors)                         |
| <input type="checkbox"/> Internet (work related)                                                                            | <input type="checkbox"/> Tax agent fees (if not ABF Partners)                                |
| <input type="checkbox"/> Computer equipment (including repairs, software, etc)                                              | <input type="checkbox"/> Self Education (other than HECS-HELP fees)                          |
| <input type="checkbox"/> Home Office - <i>refer to separate worksheet</i>                                                   | <input type="checkbox"/> Protective Clothing or Uniform costs                                |
| <input type="checkbox"/> Office equipment - calculators, organisers, furniture                                              | <input type="checkbox"/> Interest on loans on investments (shares, managed<br>funds etc)     |
| <input type="checkbox"/> Motor vehicle expenses - <i>refer to separate worksheet</i>                                        | <input type="checkbox"/> Personal Superannuation Contributions                               |

### OTHER:

- ☐ Private Health Insurance Annual Tax Statement
- ☐ Acknowledgement Letter re: claiming Personal Superannuation Contributions

**We encourage you to complete the separate worksheets available**

### MAJOR EVENTS

Please let us know of any significant events that happened to you during the year..... baby, marriage, new home, new investment property, sale of an asset, change of occupation.....

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