

2026 INDIVIDUAL CHECKLIST

Essential Items

Name: _____

Address: _____

Email Address: _____

Telephone: (AH) _____ (BH) _____ (Mobile) _____

T.F.N: _____ D.O.B: _____

Details of Dependents (including spouse)

Name	Date of Birth	Tax File Number	2024 Income	Relationship
_____	__/__/__	____-____-____	\$	Spouse
_____	__/__/__	____-____-____	\$	Son/Daughter*
_____	__/__/__	____-____-____	\$	Son/Daughter*
_____	__/__/__	____-____-____	\$	Son/Daughter*
_____	__/__/__	____-____-____	\$	Son/Daughter*
_____	__/__/__	____-____-____	\$	Son/Daughter*

Income

- Income statements
- Foreign income information
- Financial investment loss information
- Child support you paid
- Eligible Termination Statements, Roll-over Notifications
- Interest Received – Name of Payer and amount of Interest (obtain statement of interest paid from the bank etc.)
- Dividend Income – Attach dividend advice notices
- Dividend reinvestment Plans – Attach reinvestment notices
- Details of Income from Partnerships or Trusts over which you do not have control including TFN (if known)
- Other cash earnings etc.
- Annual tax statements from Managed funds

Other Income

- Rental properties (including Airbnb, Stayz, etc.)
- Business (including sharing economy income, e.g. Uber, Airtasker)
- Foreign income
- Capital gains (including cryptocurrency gains). Details of any property, shares etc. (other than your residence) sold or disposed of during the year together with the following:
 - Date of Sale and Net Sale Proceeds
 - Date of Purchase and Cost
 - Date and cost of any improvements or additions thereto
- Employee share schemes

Deductions

Motor running costs associated with work including:

- Cost of vehicle and date purchase - provide documentation
- leasing of Motor Vehicle
- Car wash
- Interest payments
- Fuel and oil
- Registration
- Insurance
- Repairs and Maintenance
- Logbook business use percentage (for at least 3 months continuous weeks), kilometres travelled and type of car, if business kilometres greater than 5,000KM

Work related travel expenses:

- Tolls
 - Parking
 - Accommodation
 - Car hire
 - Domestic Travel*
 - International Travel - Airfares and Accommodation*
- * Need a travel diary if away for 6 or more consecutive nights

Work related Clothing Expenses:

- Laundry
- Dry Cleaning
- Glasses, sunhat and sunscreen for outdoor workers
- Occupation specific clothing
- Protective clothing
- Protective work boots
- Gloves, masks and high visibility

Self-Education Expenses:

- Course Name
- Institution
- Course Fees
- Textbooks
- Stationery, printing and postage
- Student Union fees
- Computer - provide purchase date, price and study use%

Other Work Related Expenses:

- Tools of trade
- Computer Consumables and software
- Income Protection Insurance - outside of superannuation
- Industry Magazines, Newspapers and professional journals
- Insurance premiums
- Materials and supplies
- Meal Allowance - require amount paid per meal
- Membership and Association Fees
- Reference books and Journals
- Union Fees
- Mobile telephone and business use percentage
- Home Internet and business use percentage
- Subscriptions
- Seminars and Education workshops
- Printing, Postage & Stationery
- Computers/Laptops and other work-related assets more than \$300 (provide date purchased, description and amount)
- Income protection insurance (Outside of your super)
- Donations over \$2 to Public Institutions, Overseas Aid Funds, Voluntary School Building Funds (compulsory payment is not deductible)
- Tax agent fees
- Cost to Travel to Tax Agent

Home Office Expense is working from home to fulfil your employment duties, not just carrying out minimal tasks such as occasionally checking emails or taking calls.

- Home electricity cost per unit of power used i.e. electricity charge rate - refer to your utility bill for this information
- Home gas
- The average unit used per hour - this is the power consumption per kilowatt hour for each appliance, equipment or light used (e.g. Light bulb, Laptop, desktop, Air conditioner).
- Cleaning multiplied by home office space percentage (home office area space/total home area space)
- Office furniture e.g. desk, chair, furnishings (date paid, description, amount paid)
- Repair of office furniture and equipment
- Work equipment e.g. phones, computers, laptops (date paid, description, amount paid)
- Computer consumables and stationery e.g. ink cartridges
- Mobile telephone & work percentage
- Mobile internet & work percentage (4 week diary required)
- Home internet & work percentage
- Actual hours spent working from home 1 July 2023 to 30 June 2024 - you must have a diary note for EVERY hour – visit our website to get a FREE electronic WFH diary.

Rebates and Surcharges

- Letter from private health insurance re-cover
- Medicare exemption – letter from relevant employer
- Superannuation contributions on behalf of spouse:
 - Name of fund: _____
 - Contributions : \$ _____
 - Income of spouse: \$ _____

Deductible Personal Superannuation Contributions made by yourself:

- Name of fund: _____
- Policy number: _____
- Amount contributed: \$ _____
- Notice of intention to claim a deduction for personal superannuation contribution acknowledgment from your fund

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