

2026 YEAR END CHECKLIST

FOR INDIVIDUAL INCOME TAX RETURNS

- ☐ Income Statements (must have an STP finalised status).
- ☐ Confirmation of any allowances received (if not specifically detailed on your income statement).
- ☐ Details of Interest Received from all bank accounts.
- ☐ Dividend Statements of dividend paid during the year.
- ☐ Annual Tax Statements for units held in managed funds.
- ☐ Details of any foreign income received.
- ☐ Annual Rental Property Statements (if managed by an agent).
- ☐ Additional Rental Property expenses (i.e. interest on loans, Quantity surveyor reports etc.) that have not been included in the agent's rental property statement).
- ☐ Shares purchased and/or sold during the year.
- ☐ Real estate (or other assets) purchased and/or sold during the year including solicitor's settlement sheet.
- ☐ Details of any transactions involving cryptocurrency (e.g. Bitcoin).
- ☐ Details of any other income derived.
- ☐ Work related expenses that have not been reimbursed or paid by your employer including:
 - ☐ Work related motor vehicle expenses (details of KMs travelled or supply copy of valid logbook).
 - ☐ Work related travel expenses.
 - ☐ Work related clothing expenses.
 - ☐ Work related self-education expenses.
 - ☐ Work related home office expenses (including diary log of total hours worked or 4-week diary log showing usual pattern of working at home).
- ☐ Donations made to deductible gift recipients (DGRs).
- ☐ Super contributions acknowledgement letter from your super fund for any deductible personal contributions.
- ☐ Income Protection Insurance paid outside of super.
- ☐ Details of any other expenses incurred that are connected to income earned.

Please contact our office if you require assistance with your 2025-26 Tax Return.

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