

The Lodgement Document Checklist

Everything to gather before you lodge the return you file from 1 July 2026 – tick each item off and nothing gets missed, under-claimed or held up.

For Australian individual taxpayers | Prepared by Y&S Accounting, registered tax agents | taxbne.com.au

Income documents

- ☐ Income statement (payment summary) – in myGov, marked "tax ready" (usually from late July)
- ☐ Bank interest statements – from your bank's app or website
- ☐ Dividend statements, including franking credits – from the share registry or broker
- ☐ Managed fund or ETF annual tax statements
- ☐ Government payment summary (Centrelink, via myGov)
- ☐ Rental property income and expense summary – your records or property manager's annual statement
- ☐ Foreign income details – residents declare worldwide income
- ☐ Crypto and share disposal records for any CGT events

Deduction evidence

- ☐ Receipts for work-related expenses – tools, equipment, uniforms, laundry
- ☐ Car and travel records – logbook or kilometre diary (not home-to-work travel)
- ☐ Working-from-home hours record for the whole year – an estimate is not accepted
- ☐ Self-education costs tied to your current job
- ☐ Union fees, professional memberships and subscriptions
- ☐ Donations of \$2 or more to registered DGRs
- ☐ Income protection insurance premiums (outside super)
- ☐ Last year's tax agent fee – deductible this year

Tip: myDeductions app data can be uploaded straight into your return.

Everything else

- ☐ Private health insurance statement – for the rebate and Medicare levy surcharge calculation
- ☐ Spouse details, if applicable – needed for offset and surcharge calculations
- ☐ HECS/HELP balance awareness – repayments start at \$54,435 of income
- ☐ Bank account BSB and number for your refund – double-check it; wrong details are a common mistake

Deadlines and what lateness costs

Channel	Deadline	Notes
myTax (self-lodgement)	31 October 2026	Falls on a Saturday – effectively 2 November
Registered tax agent	15 May 2027	Register with the agent before 31 October
Tax agent (concessional)	5 June 2027	Automatic for eligible clients

Late lodgement penalties

Failure to lodge on time costs \$330 for each 28 days overdue, up to \$1,650 – though penalties are generally not applied when the return produces a refund. Lodging through a registered tax agent also gives safe harbour protection if the agent misses the deadline after you provided everything on time.

Gathered everything? We take it from here

Fixed-fee individual returns from \$145 inc. GST, in person in Brisbane or by video call. A registered tax agent reviews every deduction before lodgement, and the fee is deductible next year.

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This checklist is general information for Australian individual taxpayers, prepared by Y&S Accounting Brisbane, and is current for the 2025–26 income year as at July 2026. Rates and thresholds can change, and eligibility depends on your circumstances. This is general information, not personal tax advice, and does not take account of your individual situation. Confirm current figures at ato.gov.au or speak with a registered tax agent before acting. Y&S Accounting is a certified practising accountant practice and registered tax agent.