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TAX AGENTS | ACCOUNTANTS
BUSINESS ADVISORS

2026 TAX CHECKLIST INDIVIDUAL INCOME TAX RETURNS

Documents to help prepare your tax return

- **Supporting Documents:** Please provide documents for any items below that apply to you. If you don't have all the documents, continue to attend your appointment and you can post, bring in, email or phone in the missing information.
- **Audits and Data Matching:** The tax office may ask you to prove claims made on your tax return by asking to see documents and receipts. They check income with organisations like banks and Centrelink (Human Services). Undeclared income and false claims can incur serious penalties. Always declare all of your income and make sure you have evidence of deductions you are claiming.

IMPORTANT	BANK DETAILS
The tax office requires **all tax refunds** to be paid into an Australian bank account. Please ensure you have your account details.	Account Details: BSB, Account No., Name on Account.
NEW CUSTOMERS	**DOCUMENTS**
New clients	• **Photo Identification** – e.g. passport or drivers licence • A copy of last year's taxation return if available.
INCOME	**DOCUMENTS**
Salary and wages.	In most cases details will appear in your myGov account and in Prefill Reports which we can import from the Australian Taxation Office records.
Employment Termination Payments.	
Newstart, Sickness or other Government Benefits.	
Australian Government Pensions.	
Australian annuities and superannuation income streams.	Payment Summary or a statement from the Australian annuity, superannuation or RSA provider.
Interest.	Bank statement, passbook, or other documentation from financial institutions or other sources confirming interest paid.
Dividends.	Dividend statements.
Capital gains or losses.	Documents showing the date assets were acquired, their cost price, and other expenditures that form part of the cost price. Also, documents showing the sale date, costs of disposal and sale proceeds.
Foreign source income.	Documents evidencing foreign source income.
Rent received.	Details of all rent earned, interest on borrowings that finance the rental property, details of other expenses relating to the rental property and details of capital works expenditures.
Net income or loss from business.	Details on business income and expenses.
Other income.	Documents confirming income received.
Employee Share Scheme.	Documentation provided by the employer.
TAX OFFSETS	**DOCUMENTS**
Private Health Insurance Funds.	Health Fund Statement (essential document).
Early stage investor.	Documentation you have.
Early stage venture capital limited partnership.	Documentation you have.
DEDUCTIONS	**DOCUMENTS**
Work related car expense claims	Receipts, log book, evidence of business kilometres travelled.
Other work related travel expenses	Receipts, diary.
Work related uniform and other clothing expenses, e.g. protective clothing, occupation specific clothing, non-compulsory uniform, conventional clothing, laundry, dry cleaning.	Receipts.
Other Work Related Expenses: ●Seminars/courses not at an education institution but related to work (including travel, course fees, other) ●Home office expenses ●Computer and software ●Telephone and mobile ●Tools and equipment ●Subscriptions, union fees, professional body fees ●Journals/periodicals ●Depreciation ●Expenses in relation to allowances ●Sun protection ●Other.	Receipts. (Where there is a private use component – for example home office telephone, mobile or internet where a percentage of use is for business and a percentage of use is private, the deduction will only be allowable for the business component if there is a 1 month usage diary verifying the claim).
Assets purchased for work purposes (either totally or partially).	Receipts.
Interest and dividend deductions.	Financial statements or receipts.
Gifts and donations.	Receipts.
Cost of managing tax affairs.	Receipts (e.g. tax agent fees, travel to accountant).
Other deductions e.g. Income Protection Insurance.	Receipts or supporting documents.