

2025-26 Tax Return *Checklist.*

Everything to gather before your tax appointment — individuals & employees

Income

- ☐ **Income statement** (pre-fills from your employer, usually by late July)
- ☐ **Bank interest** earned across all accounts
- ☐ **Dividend statements** & DRP records
- ☐ **Managed fund / ETF** annual tax statements
- ☐ **Rental property** income & agent summaries
- ☐ **Crypto & shares sold** — buy/sell dates and amounts
- ☐ **Side-hustle / ABN income** (see page 2)
- ☐ **Government payments** (Centrelink, etc.)

Offsets & other

- ☐ **Private health insurance** annual statement
- ☐ **Spouse details** & taxable income
- ☐ **HECS/HELP** — we check your balance
- ☐ **Income protection insurance** premiums (policies held outside super)

Deductions

- ☐ **Working from home** — hours diary or roster (fixed rate 70c/hour for 2025-26, records required)
- ☐ **Work-related car travel** — km records (88c/km, up to 5,000km, or logbook method)
- ☐ **Uniforms & laundry** (occupation-specific or logo)
- ☐ **Self-education** linked to your current job
- ☐ **Tools & equipment** (items \$300 or less can usually be claimed in full)
- ☐ **Phone & internet** — work-use percentage
- ☐ **Union fees & memberships**
- ☐ **Donations** \$2+ to registered charities (DGRs)
- ☐ **Last year's tax agent fee**
- ☐ **Personal super contributions** (notice of intent required; concessional cap \$30,000 incl. employer super)

Record rule: if your total work-related claims exceed \$300, you need written evidence for the lot — keep receipts digital, a photo is fine.

Side Hustles & *Sole Traders.*

Extra items if you drive, deliver, freelance, consult or run a small business

Business income & records

- ☐ **Income summary** — invoices, platform statements (Uber, DiDi, Airtasker, Etsy, YouTube, etc.)
- ☐ **Bank statements** for the business account
- ☐ **Expense records** — software, insurance, fees, stock, subcontractors
- ☐ **Home office** — floor-area % or hours records
- ☐ **Vehicle logbook** — 12 weeks establishes your business-use %
- ☐ **Asset purchases** — laptops, tools, equipment (we'll apply the right write-off treatment)
- ☐ **BAS lodged** during the year (if GST registered)

Rideshare drivers: GST registration is required from your first dollar of rideshare income — no threshold. Talk to us if you haven't registered.

Key dates 2026

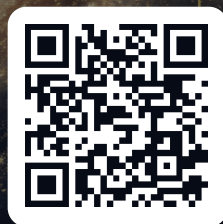
- ☐ **1 July 2026** — 2025-26 returns open
- ☐ **Late July** — employer & bank data pre-fills; lodging after this means fewer amendments
- ☐ **31 October 2026** — deadline if you lodge yourself
- ☐ **Registered agent extensions** — join our client list before 31 October and your deadline may extend as late as May 2027

Smart moves

- ☐ **Don't rush the first week of July** — pre-fill data lands late July; accurate beats fast
- ☐ **Super contributions** must be received by your fund before 30 June to count for that year
- ☐ **Keep a deduction folder** on your phone — snap receipts as they happen

Ready when you are.

Fixed fees · 100% online · Australia-wide. Book a free 15-minute chat and we'll tell you exactly what applies to you — no obligation.



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