

2025 Individual Tax Return Checklist w/ investment property

Full name			
Postal address			
Residential address			
Email address			
Mobile phone			
Tax file number		Date of birth	
Bank details	BSB	Account number	

During the period 1 July 2024 to 30 June 2025:

How many employers did you have?	0	1	2	3	4+
What was your main occupation title ?					

Did you earn any bank interest income?	Yes	No	Amount:
Did you earn any share dividend income?	Yes	No	
Did you earn any managed funds income?	Yes	No	
Did you buy, trade, or sell any cryptocurrency ?	Yes	No	
Did you have an investment property ?	Yes	No	
Did you sell any assets during the financial year?	Yes	No	Asset type:

How many dependent children lived with you? <small>*Children up to 21 years of age and full-time students under 25 years.</small>	0	1	2	3	4+
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Did you have private health insurance ?	Yes	No	Provider:
What type of private health insurance coverage did you have?			Extras Only Hospital Cover

Did you have a **spouse** (married or de facto)? Yes No

Spouse's name:

Spouse's DOB: Spouse's taxable income: \$

Did you use your **vehicle** for work travel during the year? Yes No

You can't claim car expenses for travel between home and work or vice versa, even if you live a long way from your work. You also can't claim car expenses if you were reimbursed for them by your employer.

Vehicle make / model	<input type="text"/>	Rego number	<input type="text"/>
Purchase price	<input type="text"/>	Date purchased	<input type="text"/>

Choose Option A unless you possess a current logbook, in which case you may choose Option B.

A Claiming the **cents per kilometre** method

Provide your **total work kilometres** travelled for the year: *Max 5,000kms kms

B Claiming the **logbook** method

Do you have a **current logbook**? Yes No
**Each logbook you keep is valid for 5 years, but you may start a new logbook at any time.*

What **date** was your logbook completed?

What **percentage** of your vehicle's usage was for work purposes? %

Provide your **vehicle's expenses** for the year. Provide actual costs, not estimates.
**Provide whole amounts and we'll apportion them based on your work-related percentage.*

Registration	\$ <input type="text"/>	Insurance	\$ <input type="text"/>
Repairs and Maintenance	\$ <input type="text"/>	Fuel and oil	\$ <input type="text"/>
Interest	\$ <input type="text"/>	Other	\$ <input type="text"/>

Did you incur any work-related **travel expenses**? Yes No

Types of expenses may include public transport, air travel, taxi fares, ride-share fees, road tolls, parking fees, short-term car hire, meals, incidental expenses, accommodation, etc.

- expense type and total:
- expense type and total:
- expense type and total:

Did you incur any work-related **uniform, clothing, laundry, protective equipment expenses**?

Yes

No

This is a uniform, either compulsory or non-compulsory that is unique and distinctive to the organisation for whom you work. You can claim the costs of washing, drying, and ironing eligible work clothes, or having them dry-cleaned. You must have written evidence, such as diary entries and receipts, for your laundry expenses if the amount of your claim is greater than \$150.

• expense type and total:

• expense type and total:

• expense type and total:

Did you have any **self-education expenses** relating to your job?

Yes

No

Self-education expenses are deductible when the course you undertake leads to a formal qualification. The course must have a sufficient connection to your current work activities as an employee and: maintain or improve the specific skills or knowledge you require in your current work activities; and result in, or is likely to result in, an increase in your income from your current work activities.

• expense type and total:

• expense type and total:

Did you use your **home office** for work purposes?

Yes

No

To claim home office, you need to have a dedicated work area, such as a home office when you perform any work from home.

What is the total number of hours you worked from home in the year?

Did you keep a record of all the hours you worked from home?

**E.g., a timesheet, roster, diary, or similar document.*

Yes

No

Total home energy expenses (electricity and gas) paid for the year?

What percentage of your home's energy expenses were work-related?

%

Did you use your **home internet** for work-related purposes?

Yes

No

If you used your own internet for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it.

What was your average monthly home internet cost?

What percentage of your home internet usage was work-related?

%

Did you use your **mobile phone** for work-related purposes?

Yes

No

If you used your own mobile phone for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it.

What was your average monthly mobile phone bill?

What percentage of your mobile phone usage was work-related?

%

Did you incur any **other work-related** expenses?

Yes

No

Items may include books, periodicals, digital information, protective glasses, cosmetics containing sun protection, overtime meals, seminars, conferences, education workshops, union fees, subscriptions to associations, tools, or equipment <\$300, stationery, briefcases, satchels, etc.

• expense type and total:

Did you purchase any **tools, equipment, etc. that cost over \$300**?

Yes

No

If you bought tools, equipment, or other assets to help earn your income, you can claim a deduction for some or all the cost. If you use the tools for both work and private purposes, you will need to apportion the amount you claim. If you have a computer that you use for private purposes for half of the time, you can only deduct 50% of the cost.

• item description, date of purchase, purchase price, and work-related percentage:

• item description, date of purchase, purchase price, and work-related percentage:

Did you make any **donations** of \$2 or more?

Yes

No

• recipient and total:

• recipient and total:

Did you pay any **tax agent / accounting fees**?

Yes

No

Amount

Did you make any **post-tax super contributions**?

**Does not include salary sacrifice.*

Yes

No

Amount

Did you submit a **notice of intent to claim a tax deduction** form to your super fund for the contributions you made?

Yes

No

Did you pay any **income protection insurance**?

**Excludes policies covered within your super fund.*

Yes

No

Amount

Did you pay any **child support**?

Yes

No

Amount

Do you have any **HELP / SFSS / TSL debt**?

Yes

No

Balance

Do you have any **notes or comments** for GTS?

**If you're a new client referred by someone, provide their name here.*



Did you have a rental property during the year?	Yes	No
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- property address:

Purchase date of property:		Purchase cost:	
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Number of weeks available for rent during the year:	
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Was the property sold during the year? <i>If property was sold, provide settlement statement for both purchase and disposal.</i>	Yes	No
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- date of sale:

Do you have a quantity surveyor report ? <i>*If yes, provide a copy. This is also known as a depreciation schedule.</i>	Yes	No
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Do you share ownership of the property?	Yes	No
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- name and % ownership:
- name and % ownership:
- name and % ownership:

Rental property income earned for the year	
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Gross rental income earned for the year:	
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Other rental income received during the year:	
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Rental property expenses paid during the year	
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Advertising costs:	
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Bank fees: <i>Bank fees paid for accounts used for collecting rent and paying outgoings.</i>	
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Body corporate fees:	
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Borrowing expenses: <i>Search fees, valuation fees, survey and registration fees, lender's mortgage insurance, etc.</i>	
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Capital allowances: <i>Annual write-off for the depreciation of the building and/or any structural improvements or additions. See depreciation schedule prepared by quantity surveyor.</i>	
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Cleaning costs:	
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Council rates:	
Depreciation of fixed assets: <i>Carpets, blinds, hot water system, air conditioning, etc. See depreciation schedule prepared by quantity surveyor.</i>	
Electricity and gas costs: <i>Electricity and gas expenses not paid for by the tenant.</i>	
Gardening and landscaping costs:	
Insurance: <i>Insurances may cover building, fire, burglary, public liability, landlord insurance, etc.</i>	
Interest paid on loan:	
Land tax:	
Lease preparation, registration, and stamping costs:	
Legal costs: <i>Recovering unpaid rent, seeking damages for breach of agency agreement, reviewing tenant credit worthiness, etc.</i>	
Pest control costs:	
Property management fees / commission:	
Quantity surveyor's fees:	
Repairs and maintenance: <i>Initial repairs will be considered capital improvements and written down over time.</i>	
Secretarial and bookkeeping fees:	
Security monitoring costs:	
Stationery: <i>Stationery used to maintain your rental records. Telephone calls relating to property management – Keep a diary record of these to satisfy the ATO. Postage on documents relating to property management.</i>	
Water charges:	

Did you purchase any assets for the property?	Yes	No
<ul style="list-style-type: none"> Date, description, and cost: 		
<ul style="list-style-type: none"> Date, description, and cost: 		
<ul style="list-style-type: none"> Date, description, and cost: 		