

2026 Tax Return Checklist incl. Rental Property

1 July 2025 – 30 June 2026

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

Income & Investments

How many employers did you have?	0	1	2	3	4+
What was your main occupation title ?					
Did you serve in the Australian Defence Force ?	Yes	No			
Did you earn any bank interest income?	Yes	No	Amount:		
Did you own any shares/investments or managed funds ? (includes Employee Share Schemes)	Yes	No			
What shares or investments did you own during the financial year? List the company/fund names and provide any dividend statements, annual statements, or brokerage reports.			Investment names/codes:		
Did you buy, sell, or trade any shares, cryptocurrency, or other investments ?	Yes	No	Details:		
If yes, please upload your investment transaction reports (e.g. share statements, brokerage reports, crypto transaction history) and provide details of any investments bought or sold during the year.					
Did you earn any foreign source income?	Yes	No			

Business & Property

Did you operate as a contractor or run a small business during the year (using your personal ABN)?	Yes	No
Did you have an investment property or rent out any part of your home?	Yes	No

Your Circumstances

Do you have any HELP / SFSS / TSL debt ?	Yes	No	Balance, if known:
Were you an Australian resident for tax purposes for the entire year?	Yes	No	
Did you live in a remote area during the year? <i>If you lived in remote or isolated areas of Australia you may be eligible for the zone tax offset, which provides a tax reduction based on your location and the duration of your stay in that area.</i>	Yes	No	
Suburb and State:	Number of days:		

Did you have a spouse (married or de facto)?	Yes	No
Spouse's name:		
Spouse's DOB:		Spouse's taxable income: \$

How many dependent children lived with you? <i>Children up to 21 years of age and full-time students under 25 years.</i>	0	1	2	3	4+
Did you pay any child support ?	Yes	No	Estimated amount:		
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 hold coverage for the whole financial year?	Yes	No			

Your Work-Related Expenses

Did you have any self-education expenses relating to your job?	Yes	No
<i>Examples include seminars, conferences, courses, or workshops. To claim these, the activity must be directly related to your current job. It should help you improve your skills or knowledge for your work and either increase your income or be likely to help you earn more in your current role.</i>		
expense type and total:		
expense type and total:		
Did you incur any work-related uniform, clothing, laundry, protective equipment expenses?	Yes	No
<i>This includes a uniform that is specific and identifiable to your employer. You can claim the cost of washing, drying, ironing, or dry-cleaning eligible work clothing. If your total laundry claim is more than \$150, you'll need written evidence, such as a diary record and receipts, to support your expenses.</i>		
expense type and total:		
expense type and total:		
expense type and total:		

Did you use your vehicle for work-related travel during the year?	Yes	No
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You can't claim car expenses for travel between your home and regular workplace, even if you live a considerable distance away. You also can't claim car expenses that have been reimbursed by your employer.

Vehicle make / model		Rego number	
Purchase price		Date purchased	

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

A	Claiming the cents per kilometre method
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Total work kilometres travelled for the year:	*Max 5,000kms	kms
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B	Claiming the logbook method
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Do you have a current logbook ? <i>Each logbook you keep is valid for 5 years, but you may start a new logbook at any time.</i>	Yes	No
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What date was your logbook completed?	
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What percentage of your vehicle's usage was for work purposes?	%
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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	\$	Insurance Premium	\$
Repairs and Maintenance	\$	Fuel and oil	\$
Interest on loan	\$	Other	\$

Did you incur any work-related travel expenses?	Yes	No
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Examples include public transport, air travel, taxi fares, ride-share fees, road tolls, parking fees, short-term car hire, meals, incidental expenses, accommodation.

• expense type and total:
• expense type and total:
• 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 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 during 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 purchase any **computer equipment** or **office furniture**?

Yes

No

If you bought a computer or office equipment for work, you can claim a deduction for the work-related part of the cost.

If you also use it for personal use, you'll need to split the cost. For example, if it's used 50% for work and 50% personally, you can only claim 50%.

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

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

Did you repair any computer equipment or office furniture ?	Yes	No
<i>If you repaired a computer or office equipment used to earn your income, you may be able to claim a deduction for the cost of those repairs. If the item is also used for private purposes, you must apportion the expense based on the work-related use.</i>		

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

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

Did you buy any tools, equipment or supplies :	Yes	No
<i>Examples include work-related tools or equipment, safety gear, and stationery or office supplies used for work.</i>		

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

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

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

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

Did you buy any technology and subscriptions ?	Yes	No
<i>Examples include devices, apps or software needed for your job, antivirus or cybersecurity software, and cloud storage services for work files.</i>		

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

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

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

Did you buy any other common items ?	Yes	No
<i>Examples include briefcase or work bag, sun protection (sunscreen, sunglasses, hats for outdoor workers), first aid items kept for work purposes, and lockers or storage rentals used to store work gear. *If the cost of any item is over \$300, we'll depreciate it over its effective life and claim a portion each year, rather than the full amount upfront.</i>		

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

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

- 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
<i>Donations made to GoFundMe personal campaigns are generally considered personal gifts and are not tax-deductible. Only donations made to GoFundMe campaigns for registered charities with Deductible Gift Recipient (DGR) status may be tax-deductible. Donations are also not tax-deductible where a benefit is received in return, such as raffle tickets or prize draw entries.</i>		

- recipient and total:

- recipient and total:

- recipient and total:

Did you pay any tax agent / accounting fees ?	Yes	No	Amount:
Did you make any personal (after-tax) contributions to your superannuation fund ?	Yes	No	Amount:
<i>Does not include salary sacrifice.</i>			
Have you submitted a notice of intent to claim a tax deduction form to your super fund for the contributions you made?		Yes	No
Did you make any super contributions on behalf of your spouse ?		Yes	No

Insurance & Union Fees

Did you pay any income protection insurance ?	Yes	No	Amount:
<i>Excludes policies covered within your super fund. We'll need a copy of your income protection insurance annual statement.</i>			
Did you pay any union fees ?	Yes	No	Amount:
Did you pay any insurance to cover your work tools or equipment ?	Yes	No	Amount:
<i>This insurance can be claimed if the tools or equipment are used to earn income.</i>			

Rental Property Information

Address of your investment property:

Date property was **purchased**:

Purchase cost:

Number of weeks available for rent during the year:

Was the **property sold** during the year?

Yes

No

- date of sale:

If property was sold, please provide settlement statement for both purchase and disposal)

Do you have a **quantity surveyor report**?

Yes

No

If yes, provide a copy.

Do you **share ownership** of the property?

Yes

No

- name and % ownership:

- name and % ownership:

- name and % ownership:

- name and % ownership:

Do you use a **property manager** or **real estate agent**?

Yes

No

Do you have an **annual rental statement** from your property manager or real estate agent?

Yes

No

If yes, provide a copy.

Rental Income

Income

Gross **rental income** earned for the year:

\$

Other rental income received during the year:

\$

Other rental income can include insurance payouts for lost rent, bond money kept for unpaid rent or property damage, tenant reimbursements for repairs, and government rebates for items like solar hot water systems.

Rental Expenses

Expenses											
Accounting fees:						\$					
Advertising costs:						\$					
Bank fees: *Bank fees paid for accounts used for collecting rent and paying outgoings.						\$					
Body corporate fees:						\$					
Borrowing expenses: *Search fees, valuation fees, survey and registration fees, lender's mortgage insurance, etc.						\$					
Capital allowances: * Annual write-off for the depreciation of the building and/or any structural improvements or additions. See depreciation schedule prepared by quantity surveyor.						\$					
Cleaning costs:						\$					
Council rates:						\$					
Quarter 1		Quarter 2		Quarter 3		Quarter 4					
Depreciation of fixed assets: *Carpets, blinds, hot water system, air conditioning, etc. See depreciation schedule prepared by quantity surveyor.						\$					
Electricity and gas costs: *Electricity and gas expenses not paid for by the tenant.						\$					
Gardening and landscaping costs:						\$					
Insurance: *Insurances may cover building, fire, burglary, public liability, landlord insurance, etc.						\$					
Interest paid on loan:						\$					
Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Land tax:						\$					
Lease preparation, registration, and stamping costs:						\$					
Legal costs: *Recovering unpaid rent, seeking damages for breach of agency agreement, reviewing tenant credit worthiness, etc.						\$					
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, telephone, and postage costs: <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:	\$

Quarter 1	Quarter 2	Quarter 3	Quarter 4
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Did you purchase any assets for the property during the year?	Yes	No
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- Date, description, and cost:
- Date, description, and cost:
- Date, description, and cost:
- Date, description, and cost:

Questions & Comments

If you're a new client and were referred by someone, please let us know their name. <i>They'll receive a little thank you from us for sending you our way.</i>	Referred by:
Do you have any notes or comments you'd like to share with the General Tax team? <i>Feel free to include anything new, unusual, or important that may help us complete your return accurately (e.g. job changes, new child, investments, property, deductions, or questions).</i>	