TAX CHECKLIST 2026

PERSONAL INCOME TAX RETURN

INCOME

This information is generally available from the ATO

- ☐ Payment Summaries / Income Statements
- ☐ Termination Pay – Employment Termination Payment (ETP) statement required
- ☐ Lump Sum or Pension Income/Super Income Streams payment summaries
- ☐ Interest income from banks/building societies

Please bring in the below statements as this information might not be available from the ATO

- ☐ Dividend statements – received or reinvested
- ☐ Managed fund annual summary
- ☐ Sale of property/shares – include settlement statements for both purchase and sale
- ☐ Rental property income / expenditure / depreciation schedule (see over page)
- ☐ Cryptocurrency statements
- ☐ Any other income – if so please specify

REBATES & OFFSETS

Are you eligible to claim any of the following rebates? If yes, please provide details.

- ☐ Sole Parent–Dependent children; names and date of birth
- ☐ Superannuation paid for spouse
- ☐ Child support-Total paid
- ☐ Tax free government pension-Total received
- ☐ Zone Rebate
- ☐ Health Cover-For the whole financial year, were you, spouse, dependants covered by private patient hospital cover?

DEDUCTIONS

Personal Superannuation contributions?

Have you lodged a Notice of Intent? Yes / No

Gifts and Donations greater than $2.00

That have been made to a deductible gift recipient (DGR) who is registered to received tax deductible gifts or donations. Please provide details / receipts.

Interest and Dividend Deductions

- ☐ Bank Fees
- ☐ Management Charges

Other Deductions

- ☐ Sickness and Accident Insurance
- ☐ Income Protection insurance

WORK–RELATED EXPENSES

Motor Vehicle Expenses – did you use your car for work related travel? (this does not include going to and from work)

- ☐ **Cents per KM:** Please supply details of km's travelled and make and model if under 5000km
- ☐ **Logbook:** please supply logbook and detailed list of vehicle expenditures if you wish to claim using the logbook method

Work-Related Travel

Did you incur any other work-related travel expenses which were not reimbursed? If so, please provide full details of expenditure and travel diary if necessary.

Uniform / Protective Clothing

A compulsory uniform can be claimed as a deduction (conventional clothing cannot) provided it has the employers registered company logo. Please provide purchasing and maintenance costs.

Self-Education Expenses

Description of course and details of expenses incurred. Self-Education requires a direct connection to current employment income.

Other Work-Related Expenses

- ☐ Subscriptions – Trade Union or professional associations
- ☐ Sun protection – receipts required
- ☐ Books, journals, and periodicals
- ☐ Conference and seminar expenses
- ☐ Home office expenses ** See attached ATO Fact Sheet
- ☐ Telephone (include mobile), internet **
- ☐ Tools of the trade
- ☐ Expenses in relation to allowances
- ☐ Any other expenses ** - please specify

** please provide details of apportionment between work related and private use

OTHER INFORMATION

Did you start full-time employment for the first time this year? If yes, please provide date started

Have any of your personal details changed since your last tax return?

Ensure you notify us of changes to residential/postal address. Please reconfirm your bank account details.

Occupation? – please provide

TAX CHECKLIST 2026

PERSONAL INCOME TAX RETURN

RENTAL STATEMENT 2026

Property: (Address) ______________________________

Copy of Settlement Statement at time of Purchase given to Accountant? Yes / No

Dates available for rent:	
Gross rent received:	
Other rental income:	
Expenditures:	
Advertising for tenants	
Asset Purchase – Date / Amount	
and Description	
Bank Charges	
Body corporate fees	
Borrowing expenses	
Cleaning	
Council rates	
Depreciation on plant	
Emergency Services Levy	
Gardening / Lawn Mowing	
Insurance – Building or Landlord	
Interest on loan(s)	
Land tax	
Pest control	
Property agent fees / commission	
Repairs and maintenance	
Special building write off	
Stationery, telephone & postage	
Water charges	
Other – please specify	
NET PROFIT/LOSS:	$
SHARED OWNERSHIP PERCENTAGES:	**PERCENTAGE OWNERSHIP**
NAME:	
NAME:	
NAME:	

Please provide us with a copy of your depreciation schedule. If you don't have one, please speak with us.

VERVEGROUP

Australian Government
Australian Taxation Office

Working from home deduction

To claim a deduction for working from home expenses, you must:

- be working from home to fulfil your employment duties, not just completing minimal tasks
- incur additional running expenses as a result of working from home
- have records to show you incurred these expenses and the hours that you worked from home during the income year.

To work out your working from home deduction, you can use the fixed rate method or the actual cost method. Remember, you can only claim the work-related part of an expense.

Fixed rate method

The fixed rate method allows you to claim a set rate per hour you work from home and covers expenses that are often difficult to apportion. This includes:

- data and internet
- mobile and home phone usage
- electricity and gas
- computer consumables (for example, printer ink)
- stationery.

You don't need a dedicated home office to use this method.

You can't claim a separate deduction for any of the expenses the fixed rate includes.

You can claim a separate deduction for:

- the decline in value of assets used while working from home, such as computers and office furniture
- the repairs and maintenance of these assets
- cleaning (if you have a dedicated home office).

Actual cost method

The actual cost method allows you to claim a deduction for the actual expenses you incur as a result of working from home.

This may include:

- data and internet
- mobile and home phone usage
- electricity and gas
- computer consumables (for example, printer ink)
- stationery
- the decline in value of assets used while working from home, such as computers and office furniture, as well as any maintenance and repairs of these items
- cleaning (if you have a dedicated home office).

The actual cost method requires detailed calculations and records. For example, you will need to know and have records of the cost per unit of electricity and average units used per hour. If you plan to use this method, see ato.gov.au/home

As an employee working from home, you generally can't claim for occupancy expenses, such as rent, insurance or mortgage interest.

Record keeping checklist

Check you have the correct records before claiming a working from home deduction. If you don't have records, don't claim the expense.

You can use the myDeductions tool in the ATO app to keep track of your expenses and receipts throughout the year.

See ato.gov.au/myDeductions

Fixed rate

You will need the following records:

- [ ] a record of all the hours you work from home for the entire income year (for example, timesheets, rosters or a diary)
- [ ] evidence you paid for the expenses incurred covered by the fixed rate method (for example, if you use your phone and electricity when you work from home, keep one bill for each of these expenses)
- [ ] records for any depreciating assets you claim as a separate deduction (for example, a computer or office furniture).

Actual cost method

You will need the following records:

- [ ] a record that represents the hours you work from home (such as timesheets, rosters or diary showing at least a 4-week regular pattern of work)
- [ ] evidence for every expense you claim, including receipts, bills or invoices which show the supplier, amount of the expense, nature of the goods, date it was paid and date of the document
- [ ] evidence of your personal and work-related use of the items or services you buy and use.

In most cases, a bank or credit card statement (on its own) isn't enough evidence of a work related expense.

Decline in value of assets and equipment (applies for both methods)

You will need records for depreciating assets, that show:

- [ ] when and where you bought the item and its cost
- [ ] when you started using the item for a work-related purpose
- [ ] how you worked out your percentage of work-related use, such as a diary that shows the purpose of and use of the item for work
- [ ] either
  - a copy of the Commissioner's determination of effective life you use to work out the decline in value of the item
  - how you worked out the effective life if you didn't' use the Commissioner's determination.
- [ ] which method you chose to work out the decline in value.

This is a general summary only

For more information, go to ato.gov.au/home or speak to a registered tax professional.

NAT 75012-07.2025 DE-73767