

Your 2026 Tax Checklist

We've made it easy to make sure you don't miss out on any deductions this tax time. Just use our checklist to prepare for your appointment.

Income

- Payment summaries and income statement
- Lump sum and Termination payment summaries
- Government payment Statements, if received
- Interest income from bank and building societies
- Dividend statement for Dividends received or reinvested
- Annual Tax Statement from Managed funds

Other Income

- Rental Properties (including Airbnb, stayz etc.)
- Business (including sharing economy income e.g., Uber, Airtasker)
- Foreign income
- Capital Gains (including cryptocurrency gains)
- Employee Share Schemes

Deductions (work related expenses)

- Motor Vehicle
- Travel (fares and accommodation)
- Uniform/workwear
- Union, registrations, Tools, subscriptions, membership
- Self-Education
- Professional development seminars. Conferences
- Working from home including telephone, computer and internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

Offsets and Refunds

- Health insurance and rebates entitlements statement
- IAS Statements or details of PAYG instalments paid
- Spouse details including Taxable and exempt income

Tax refunds

Remember to bring your bank account details including the BSB and account number, your TFN and ID with you to your appointment.



Any Questions?

Don't hesitate to call us on 95691155