



The Peak Partnership
BUSINESS ADVISERS

TAX RETURN CHECKLIST

INDIVIDUAL TAXPAYERS

Ph: 07 3360 9888 peakpartnership.com.au



CLIENT NAME

PHONE

ADDRESS

MOBILE

EMAIL

INFORMATION
PROVIDED

NOT
APPLICABLE

INCOME

Income Statements from Employers, Centrelink and/or Superannuation Funds (including any Parental Leave payments if received)	☐	☐
Lump sum payments (eg. Employment Termination Payment)	☐	☐
Non-cash benefits	☐	☐
Trust distribution statement (signed), including copy of the trust's tax return	☐	☐
Managed fund annual tax statement and Capital Gains Tax (CGT) statement	☐	☐
Partnership distribution statement, including a copy of the partnership's tax return	☐	☐
Dividend statements	☐	☐
Bank statements and term deposit statements stating interest earned	☐	☐
Buy/sell contract notes for shares (if any shares were sold)	☐	☐
Employee share scheme statements	☐	☐
Documentation regarding foreign source income, foreign assets or property	☐	☐
Contracts to acquire or dispose of investments other than shares and rental properties	☐	☐
Record of cryptocurrency wallet transactions (eg. Bitcoin, Ethereum etc.)	☐	☐

WORK-RELATED DEDUCTIONS

Tax invoices and details of depreciable assets bought during the year (eg. laptop computer)	☐	☐
Details of receipts for home office expenses, including a diary for working at home expenses	☐	☐
Details of working from home running expenses and receipts or time sheets	☐	☐
Professional journals, magazines, memberships and subscriptions, union fees	☐	☐
Receipts for self-education expenses, continuing professional development courses and seminars (may be claimable if Austudy, Abstudy or Youth Allowance received)	☐	☐
Receipts for other work-related deductions (eg. protective clothing, uniform expenses, tools and equipment, travel)	☐	☐
Vehicle logbook or Mobile App 'Export Trips' data for motor vehicle expenses (if using the logbook method or EV home charging rate) and receipts for vehicle running expenses	☐	☐
Business kilometres travelled for motor vehicle expenses (if using the cents per km method)	☐	☐



The Peak Partnership
BUSINESS ADVISERS

TAX RETURN CHECKLIST

INDIVIDUAL TAXPAYERS

Ph: 07 3360 9888 peakpartnership.com.au



2026

OTHER DEDUCTIONS

Receipts for donations of \$2.00 and over to Deductible Gift Recipients (DGR)/registered charities	☐	☐
Expenditure incurred to manage tax affairs (eg. tax agent's fees) if not The Peak Partnership	☐	☐
Expenditure incurred in earning investment income (eg. interest paid, investment advice fees), including any applicable loan statements	☐	☐
Notice of personal superannuation contributions (including Acknowledgement from Superannuation Fund)	☐	☐
Income protection insurance premiums	☐	☐

RENTAL PROPERTIES

Annual statement from property agent (if engaging the services of an agent)	☐	☐
Copy of purchase contract and settlement statement	☐	☐
Details of depreciable assets bought or disposed of during the year (including tax invoices)	☐	☐
Details of any capital works on the property (eg. renovations)	☐	☐
Privately paid expenses incurred which are not detailed on the property agent annual statement (eg. rates, water charges, land tax, insurance premiums, repairs and maintenance)	☐	☐
If property is held by more than one individual, please provide details of all owners and their legal ownership percentage	☐	☐
If property was disposed of during the year, information relating to dates/costs associated with acquisition/disposal of the property (including copy of sale contract and settlement statement)	☐	☐
Loan statements for property showing interest paid for the income year	☐	☐
Period property was rented out during the income year, including number of weeks property was held as 'available' for rent	☐	☐
Records detailing rental income and expenses (if not using the services of a property agent)	☐	☐

TAX OFFSETS AND REBATES

Details of any superannuation contributions you made for your spouse	☐	☐
Details of dependants, including their age, occupation and income	☐	☐
Private health insurance statement (if received), including details of any prepaid premiums (where insurance is held with your spouse, please provide a copy of his/her statement)	☐	☐
Medicare levy exemption/reduction documents	☐	☐
Child Support payments you and/or your spouse paid during the year	☐	☐



The Peak Partnership
BUSINESS ADVISERS

TAX RETURN CHECKLIST

INDIVIDUAL TAXPAYERS

Ph: 07 3360 9888 peakpartnership.com.au



2026

SOLE TRADER

Cashbook, including records of drawings taken before the business takings were banked	☐	☐
Copies of Business Activity Statements (BAS) lodged with the Australian Tax Office	☐	☐
Copies of Instalment Activity Statements (IAS) lodged with the Australian Tax Office	☐	☐
Copies of PAYG Payment Summaries for employees (if not lodging through Single Touch Payroll)	☐	☐
Details of any Government grants, subsidies, rebates or payments received	☐	☐
Details of superannuation contributions for employees and outstanding liabilities at 30 June 2026	☐	☐
Details of any assets purchased, including tax invoices (showing purchase date and amount)	☐	☐
Payments of salaries and superannuation to associated persons (eg. your spouse)	☐	☐
Records from accounting software (eg. trial balance, profit and loss, balance sheet, back-ups)	☐	☐
Bank statements of all accounts of the business	☐	☐
Notice of superannuation contributions for self-employed persons	☐	☐
Statements for all loans and credit cards of the business	☐	☐

OTHER INFORMATION – ALL INDIVIDUALS

Details of residency status	☐	☐
Notice of superannuation contributions and notice of intent to claim a deduction (if applicable)	☐	☐
Total superannuation balance (all superannuation fund accounts)	☐	☐
If you have any doubt about income received/expenses incurred, please bring the documents with you	☐	☐
Any other information that you think is relevant	☐	☐