LEE · GREEN
STRATEGIC ACCOUNTANTS

2026 FINANCIAL YEAR
1 July 2025 – 30 June 2026

Individual tax return checklist

Use this checklist to gather everything we need to prepare and lodge your 2026 individual tax return. Tick each item that applies to you, note the amount where you know it, and attach or upload the supporting documents.
Items you do not have simply leave blank.

CLIENT NAME	CONTACT PHONE / EMAIL

Residency and visa status

	ITEM	AMOUNT / NOTE
☐	Australian resident for tax purposes for the whole year Tax residency is not the same as your immigration status or citizenship	
☐	Arrived in or departed Australia during the year Give us the dates — a part-year residency changes your tax-free threshold	
☐	Held a 417 or 462 working holiday visa at any time Compulsory to declare. Working holiday makers are taxed at a different rate from the first dollar	
☐	Held any other temporary visa Visa subclass and the dates it was held — temporary residents are taxed on Australian income only	
☐	Living or working overseas during the year Where, for how long, and whether you kept a home or family in Australia	

Income

	ITEM	AMOUNT / NOTE
☐	Salary and wages — all employers Income statements are usually pre-filled by mid-July. Tell us of any employer not shown	
☐	Allowances, tips, directors fees and commissions	
☐	Employment termination payments or redundancy ETP payment summary and a copy of the termination letter	
☐	Australian government payments Centrelink pensions, allowances, JobSeeker, paid parental leave	
☐	Superannuation income streams and lump sums	
☐	Bank and term deposit interest Include joint accounts and accounts held for children	
☐	Dividend statements Franked and unfranked amounts plus franking credits, including DRP participation	
☐	Managed fund and trust annual tax statements Annual tax statement or AMIT member statement — not just the distribution advice	

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☐	Partnership or trust distributions	
☐	Foreign income, pensions and foreign assets Include foreign tax paid and any interest in foreign entities	
☐	Other income Gig or platform work, cash jobs, prizes, insurance recoveries, hobby turned business	

Rental property

Complete one set for each property. Please provide the property address, ownership percentages, and the dates it was available for rent.

	ITEM	AMOUNT / NOTE
☐	Annual statement from your managing agent	
☐	Loan interest and bank fees Loan statements covering the full year; tell us if the loan was redrawn or refinanced	
☐	Council rates, water, land tax, strata and insurance	
☐	Repairs, maintenance and capital works Invoices for anything over $300 — repairs and improvements are treated differently	
☐	Quantity surveyor depreciation schedule Needed once, for newly acquired or newly built properties	
☐	Purchase or sale settlement statement If the property was bought or sold during the year	

Capital gains

	ITEM	AMOUNT / NOTE
☐	Shares or units sold during the year Buy and sell contract notes, including brokerage	
☐	Property sold or contracted during the year Contract of sale, settlement statement, and original purchase costs	
☐	Crypto assets disposed of, swapped or spent A full transaction export from each exchange or wallet	
☐	Prior year capital losses carried forward	

Sole trader or business

	ITEM	AMOUNT / NOTE
☐	Business income and expense records Accounting file access, or a summary plus bank statements for the full year	
☐	BAS lodged and any GST reconciliations	
☐	Asset purchases and disposals Invoices, and finance or lease agreements	

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- ☐ Closing stock, debtors and creditors at 30 June 2026
- ☐ Wages paid, super guarantee and PAYG withheld

Work-related deductions

You need a record for every claim. There must be a direct connection to earning your income, and you must not have been reimbursed.

	ITEM	AMOUNT / NOTE
☐	Car expenses Logbook and running costs, or your work kilometres travelled — home to work travel is not claimable	
☐	Travel, accommodation and meals away overnight Travel diary required for trips of six nights or more	
☐	Uniforms, protective clothing and laundry Compulsory, occupation-specific or protective only — conventional clothing is not claimable	
☐	Self-education, courses, conferences and seminars Must relate to your current work. HELP repayments are not deductible	
☐	Working from home hours A record of all hours worked from home across the year, kept as you went	
☐	Phone and internet — work-use portion A four-week representative record supporting your percentage	
☐	Tools, equipment, computers and software Items over $300 are depreciated — please give us the invoice and purchase date	
☐	Union fees, professional memberships and subscriptions	
☐	Other work-related expenses Sun protection, licences and permits, overtime meals, seminars, work-related books	

Other deductions and super

	ITEM	AMOUNT / NOTE
☐	Donations to deductible gift recipients Receipts for gifts. Raffle tickets and dinners are not deductible	
☐	Income protection insurance premiums Policies held inside super are not claimable personally	
☐	Interest and fees on investment loans	
☐	Cost of managing tax affairs Last year's fee for preparing your return, and any ATO interest charges	
☐	Personal super contributions you intend to claim Your fund must acknowledge a notice of intent to claim before we lodge	
☐	Spouse or downsizer super contributions	

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Offsets, Medicare and income tests

	ITEM	AMOUNT / NOTE
☐	Private health insurance annual tax statement Needed for everyone on the policy, including any period without cover	
☐	Medicare levy exemption or reduction Medicare entitlement statement if you were not eligible for Medicare	
☐	Seniors and pensioners offset	
☐	Zone or overseas forces offset Dates and location of your usual place of residence in a remote zone	
☐	Invalid or carer offset	
☐	HELP, VSL or other study loan balance	
☐	Income test items Reportable fringe benefits, salary sacrifice to super, child support paid, tax-free pensions	

Additional information

	ITEM	AMOUNT / NOTE
☐	All questions relevant to you are answered Including the compulsory items: Medicare levy surcharge, under-18 income, and working holiday visas	
☐	Trust income schedule attached where trust distributions are reported	
☐	Other matters that we should know about Marriage or separation, child support payments, inheritance, moving overseas, a new business, a large one-off amount	
☐	Copies of your records kept for five years From the date you lodge — keep the return, attachments and all supporting papers	

This checklist is a general guide only and does not take account of your personal circumstances. It is not a substitute for the ATO's own instructions or for advice from us.