

2026 INDIVIDUAL TAX RETURN CHECKLIST

Please note for any items that is applicable please provide full supporting documentation to our office via email to your OC Grant Advisor or via our Hightail Link

YOUR PERSONAL DETAILS	
Name	
Mobile number	
Address	
Bank account name	
BSB	
Account number	
Dependants	Name: DOB: Name: DOB: Name: DOB: Name: DOB: Child support paid during financial year:

SPOUSE DETAILS	
Full name	
Date of birth	
Taxable income	
Were you and your spouse together for the full financial year	
If not, please provide dates	From: To:

RESIDENCY DETAILS	
Did your residency status change throughout the year	
If yes provide date you left/returned	
Were you in Australia on a working holiday Visa	

Any questions please call our office on 07 3522 2400

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INCOME SOURCES	
PAYG employment	
Employee share scheme	
Lump sum payments	
Bank interest	
Dividends	
Managed funds/ETFs	
Cryptocurrency income or disposals	
Investment property	
Partnership distribution	
Trust distribution	
Assessable scholarships, bursaries, & grants	
Share disposal	
Property disposal	
ABN	
Foreign income	
Other income	

WORK RELATED DEDUCTIONS	
Vehicle logbook & expenses or distance travelled	
Work travel expenses	
Laundry	
Self-education	
Work from home hours – Record of all hours worked for the entire year	
Mobile usage	
Internet usage	
Equipment purchase	
Other expenses	

OTHER DEDUCTIONS	
Tax agent fees	
Donations	
Income protection insurance – outside of superannuation	
Financial advice	

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OFFSETS & REBATES	
Spousal superannuation contribution	
Personal superannuation contribution	
Zone offset	
Early-stage investor tax offset	
Household private health insurance - hospital cover	

INVESTMENT PROPERTY	
Property available full financial year	
Agent annual statement	
Mortgage statements	
Depreciation report	
Details of assets purchased	
Rates	
Utilities	
Insurance	
Body corporate	
Land tax	
Repairs & maintenance	
Cleaning, lawns, & gardening	
Pest control	
Other expenses	

IF OPERATING AS A SOLE TRADER	
Accounting software used	
Cashbook showing income & expenses	
Copies of BAS & workpapers if registered for GST	
Details of assets purchased	
Copies of PAYG summaries for all employees	
Details of superannuation contributions for employees	
Details of payments of salaries & superannuation to associates	

OTHER INFORMATION	
Carried forward deferred business tax losses or CGT losses	
Any other information you think is relevant	