A E Soliman & Associates

5B/8 Station Street, Moorabbin VIC 3189
(03) 9555 5944 · admin@aesoliman.com.au
www.aesoliman.com.au

Individual Tax Return Checklist 2025–26

For the year 1 July 2025 – 30 June 2026. Tick what applies and bring or send it to us. If you're unsure whether something counts, bring it and we'll sort it out together.

Your details

- [ ] Tax file number (in ATO online services via myGov, or on your last notice of assessment)
- [ ] Bank BSB and account number for your refund
- [ ] Spouse's details and taxable income (if you have a spouse)
- [ ] Private health insurance details (usually pre-filled in myGov)
- [ ] HELP or other study loan balance (if any)
- [ ] Last year's notice of assessment (new clients)

Income

- [ ] **Income statements from all employers.** These are in myGov, marked "tax ready". Payslips alone aren't enough.
- [ ] Allowances, tips, bonuses and director's fees
- [ ] Lump sum and employment termination payments (ETPs)
- [ ] Centrelink and other government payments (e.g. JobSeeker, Youth Allowance, Austudy, Age Pension, Parenting Payment, Carer Payment)
- [ ] Super income streams and annuities
- [ ] Interest from bank accounts and term deposits
- [ ] Dividend statements, including reinvested dividends
- [ ] Distribution statements from partnerships, trusts and managed funds
- [ ] **Rental property:** rent received, agent statements and all expenses (interest, rates, insurance, repairs, depreciation schedule)
- [ ] **Capital gains:** purchase and sale details for shares, property or crypto sold or swapped during the year
- [ ] Side jobs and online platforms (rideshare, delivery, short-term rentals, selling goods or services)
- [ ] Foreign income and any foreign tax paid

Work-related deductions

Keep receipts or records for everything you claim. The ATO checks work-related claims closely.

- [ ] **Car expenses:**
  - [ ] Cents per kilometre: **88c per km** for 2025–26, up to 5,000 work km per car. Keep a record of how you worked out your km.
  - [ ] Or the logbook method: a valid 12-week logbook plus all running costs
- [ ] Work-related travel (fares, accommodation, meals on overnight work trips)
- [ ] **Working from home:**
  - [ ] Fixed rate method: **70c per hour** for 2025–26. You need a record of **actual hours** worked from home (timesheets, roster or diary). Estimates aren't accepted.
  - [ ] Or the actual cost method
- [ ] Phone and internet (work-use share, unless covered by the fixed rate above)
- [ ] Computers, laptops, software and tools: purchase receipts and work-use percentage
- [ ] Uniforms: compulsory, protective or occupation-specific clothing, and their laundry
- [ ] Union and professional association fees
- [ ] Self-education directly related to your current job
- [ ] Sun protection and safety gear (if you work outdoors)

Other deductions

- [ ] Gifts and donations to registered charities ($2 or more, with receipts)
- [ ] Cost of managing your tax affairs (including last year's accountant fee)
- [ ] Income protection insurance premiums (the part not paid through super)
- [ ] Personal super contributions you intend to claim (with your fund's acknowledgement of your notice of intent)
- [ ] Interest and fees on income-producing investments

Ready to book? Call (03) 9555 5944, email admin@aesoliman.com.au or book online at www.aesoliman.com.au/book-an-appointment/. We meet in our Moorabbin office, by phone or online, Monday to Friday, 9am–5pm.
This checklist is a general guide only and isn't tax advice. Rates are current ATO figures for 2025–26 as at November 2026. Members of the Institute of Public Accountants.