2026 Tax Return Checklist.

Required Information

Please supply the following information and documentation:

Income	
☐	Have you changed your occupation? If yes, please provide details.
☐	PAYG Summaries from employers, Centrelink and/or Superannuation Fund
☐	Interest and/ or dividend income
Partnership-Related Expenses (personally paid)	
☐	A record of the hours you worked from home for the entire year (e.g. a timesheet, roster, diary or similar document). **Note:** From 1 Jul 2022 to 28 Feb 2023, the ATO will accept a record which represents the total number of hours worked from home (e.g. a 4 week diary). From 1 Mar 2023, you will need a record of all hours you worked from home.
☐	Receipts for any travel expenses (inc. tolls & parking)
☐	Receipts for any work specific clothing
☐	Receipts for any self-education expenses (inc. conferences)
☐	Receipts for any home office expenses (e.g. if you use your phone and electricity, keep one bill for each expense).
☐	Optional: You need the following evidence to show you incur additional home office running expenses: • receipts, bills or invoices which show the supplier, amount of the expense, nature of the goods, date it was paid and the date of the document • evidence of your personal and work-related use of the items or services you buy and use.
☐	Details of depreciable assets (e.g.: Laptop, iPad, study desk etc) • when and where you buy the item and its cost • when you started using the item for a work-related purpose • how you worked out your work-related %, such as a diary For more information on claiming home office expenses, please see here
☐	Details of any other work-related expenses
Other Expenses	
☐	List of donations >$2 to registered charities
☐	Accounting fees (if tax return not previously completed by Kearney Group)
Other Items	
☐	Private Health Insurance Annual Tax Statement
☐	Details of Spouse's taxable income (if not a client of Kearney Group)

Motor Vehicle (if using log book)

Required Information	
☐	M/V details (if not the same as last financial year)
☐	Current odometer reading
☐	M/V registration
☐	M/V insurance
☐	Receipts for any M/V repairs & maintenance
☐	Receipts for any other expenses (e.g.: car washes, roadside assistance membership)
☐	M/V finance or lease agreement (if applicable)
☐	M/V purchase or sale documentation (if applicable)

Rental Income & Expenses (if applicable)

Rental Income	
☐	Annual Rental Statement from Property Agent
☐	If not engaging the services of an agent, please provide a summary of income
Rental Expenses	
☐	Body corporate fees
☐	Council rates
☐	Water rates
☐	Landlord insurance
☐	Receipts for repairs/renovation (e.g.: painting, plumbing, installation of doors/cabinets)
☐	Annual land tax assessment
☐	Loan statements for the property showing interest paid for the financial year
☐	Quantity Surveyors Report (if applicable)
Sale/Purchase of Property (if applicable)	
☐	Contract of Sale/Purchase
☐	Statement of adjustments
☐	Details of additional costs incurred not listed in above

Important Note:

Tax returns are assessed on a Self-Assessment basis. This means that the ATO may not check whether the information you have submitted is correct. We will make every effort to prepare your return accurately, however, we rely on you to ensure all relevant information is disclosed to us.

Upon completion of your tax return, you will be asked to review every page of the income tax return, and confirm that all information is correct and there are no omissions or misstatements.

- **Income:** You must declare income from all sources, in and out of Australia, including net capital gains received, for the year of income in your tax return.
- **Expenses:** To claim a work-related or other expense deduction, you must demonstrate that you have incurred the expense for income-producing purposes.

You must obtain original receipts and keep them for a minimum of five years from the date your return is lodged. The receipts must contain the following details: name of supplier and amount of expense; nature of goods/services and date of the expenses; date of the document.

For more on substantiation legislation visit:

Records you need to keep | Australian Taxation Office