2026 Individual Tax Checklist

For the year ended 30 June 2026

Before you start
Please tick the relevant boxes and attach supporting documents where applicable. If you are unsure whether something is relevant, include it or note it in the comments section.

Client Information	
Client Name	
Address	
Phone	
Email	
Occupation / Employer	
Spouse name (if applicable)	

Refund Bank Details	
Account Name	
BSB	
Account Number	

Income & Investments		
Information / document	**Yes**	**No**
Salary, wages, allowances & bonuses Income statements are usually pre-filled, but please advise of any missing or unusual amounts.	[ ]	[ ]
Interest received (all bank accounts)	[ ]	[ ]
Dividends and franking credits	[ ]	[ ]
Managed funds / trust distributions Provide annual tax statements.	[ ]	[ ]
Government payments / pensions / allowances Including taxable Centrelink or other government payments.	[ ]	[ ]
Termination or redundancy payments Provide payment summary / income statement and relevant documents.	[ ]	[ ]
Foreign income or foreign assets Including overseas employment, pensions, interest, dividends or rental income.	[ ]	[ ]
Capital gains / sale of investments Shares, ETFs, managed funds, property or other assets - provide purchase and sale records.	[ ]	[ ]
Cryptocurrency / digital assets Provide transaction or tax reports, including disposals, swaps and rewards where relevant.	[ ]	[ ]
Employee share schemes (ESS) Provide ESS statement.	[ ]	[ ]

Information / document	Yes	No
Sole trader / business income Provide income and expense summary, business records and asset purchases if applicable.	[ ]	[ ]
Other income not listed above	[ ]	[ ]

Deductions & Other Tax Information

Only include expenses you incurred yourself, were not reimbursed for, and that relate to earning your assessable income. Keep appropriate records.

Work-Related & Other Deductions		
Information / document	**Yes**	**No**
Car expenses Business/work kilometres and basis of claim; if using logbook method, provide logbook and vehicle expenses.	[ ]	[ ]
Work-related travel Airfares, accommodation, public transport, parking and other eligible travel records.	[ ]	[ ]
Clothing, laundry & dry-cleaning Occupation-specific, protective or compulsory uniform items where eligible.	[ ]	[ ]
Self-education / professional development Course fees, seminars, subscriptions, books and related eligible costs.	[ ]	[ ]
Professional memberships / union fees / registrations	[ ]	[ ]
Working from home Provide a record of hours worked from home for the income year and evidence of relevant costs. We will determine the appropriate method.	[ ]	[ ]
Phone, mobile & internet Provide bills and your work-use basis/percentage where claimed separately.	[ ]	[ ]
Computers, software, tools & equipment Provide receipts, purchase dates, cost and estimated work-use percentage.	[ ]	[ ]
Protective equipment / sun protection required for work	[ ]	[ ]
Gifts / donations to deductible gift recipients	[ ]	[ ]
Personal superannuation contributions Provide contribution details and confirmation of a valid Notice of Intent to Claim, where applicable.	[ ]	[ ]
Income protection insurance premiums	[ ]	[ ]
Tax agent fees / cost of managing tax affairs	[ ]	[ ]
Investment-related expenses (where deductible)	[ ]	[ ]
Other deductions	[ ]	[ ]

Other Information That May Affect Your Return		
Information / document	**Yes**	**No**
Private health insurance Advise if details are not pre-filled or if you held overseas/private cover that may be relevant.	[ ]	[ ]
Medicare levy exemption or reduction circumstances	[ ]	[ ]
Study / training loan Advise if you have a HELP, VSL, SSL, AASL or other relevant study/training support loan.	[ ]	[ ]
Spouse / dependants Provide spouse details and relevant family circumstances if requested by us.	[ ]	[ ]

Information / document	Yes	No
Prior-year tax matters Any carried-forward losses, amended assessments, ATO correspondence or other matters we should know about.	[ ]	[ ]
Any other unusual transactions or changes in circumstances	[ ]	[ ]

Have a rental property? Complete the Rental Property section on the next page for each property you owned or had an interest in during 2025-26.

ONLY COMPLETE THIS SECTION IF YOU HAVE A RENTAL PROPERTY

Rental Property Information

If you do not own a rental property, skip this section and continue to the Notes page.

Property Details	
Property address	
Ownership %	
Date purchased	
Date first available for rent	
Date sold (if applicable)	
Private use / not available for rent	Dates and details, if applicable

Rental Income & Expenses		
Please provide	**Attached**	**N/A**
Property manager annual statement Rental income and agent-managed expenses.	[ ]	[ ]
Other rental income Any rent or rental-related income not shown on the agent statement.	[ ]	[ ]
Loan interest Annual loan statement(s). Interest only - not principal repayments.	[ ]	[ ]
Council rates Not already included in the agent statement.	[ ]	[ ]
Water charges Not already included in the agent statement.	[ ]	[ ]
Strata / body corporate fees Include notices/statements; identify special levies where applicable.	[ ]	[ ]
Land tax Assessment / payment details.	[ ]	[ ]
Insurance Landlord/building insurance.	[ ]	[ ]
Property agent fees / commission If not included in annual statement.	[ ]	[ ]
Repairs & maintenance Invoices and a brief description of the work completed.	[ ]	[ ]
Cleaning, gardening & pest control Invoices / receipts.	[ ]	[ ]
Advertising for tenants If not included in annual statement.	[ ]	[ ]
Legal expenses Provide invoice and reason for the legal cost.	[ ]	[ ]
Borrowing expenses Loan establishment fees, mortgage registration, LMI and similar costs.	[ ]	[ ]

Please provide	Attached	N/A
Depreciating assets / new purchases Invoices for appliances, furniture, equipment and other assets.	[ ]	[ ]
Capital works / improvements Invoices for renovations, structural improvements, extensions or major works.	[ ]	[ ]
Other rental expenses Provide supporting invoices / receipts and details.	[ ]	[ ]

Rental Property Changes / Special Circumstances

Please provide	Attached	N/A
Property purchased during the year Provide settlement statement, contract of sale and relevant purchase documents.	[ ]	[ ]
Property sold during the year Provide settlement statement, contract of sale and selling-cost invoices.	[ ]	[ ]
Refinance / new loan Provide loan documents and details of borrowing costs.	[ ]	[ ]
Property used privately or rented below market value Provide dates and details.	[ ]	[ ]
Major renovation or construction work Provide invoices, dates and description of works.	[ ]	[ ]
Quantity surveyor / depreciation report Provide the report if one has been prepared.	[ ]	[ ]

Rental property records generally need to support both income and expenses. Capital and ownership records may need to be retained longer because they can affect future capital gains tax calculations.

Notes / Additional Information

Please include any additional information you think may be relevant to your 2026 individual tax return.

Examples of useful notes:

Changes in employment, investments, family circumstances, property ownership, or unusual transactions.

Privacy reminder: Please use Evolve's preferred secure document transfer method when sending personal or financial records.
This checklist is a general information-gathering guide. We may request additional information depending on your circumstances.