



KADOTA ACCOUNTING PTY LTD
Incorporating Knox Taxation and Business Advisory



2026

TAX RETURN

CHECKLIST

Individuals

Use our checklists to help save
you valuable time preparing
for your 2026 tax appointment.

WHAT TO BRING TO YOUR TAX APPOINTMENT

NEW CLIENTS ONLY

- ☐ Your most recent Tax Return and
- ☐ Notice of Assessment

INCOME

- ☐ Allowances (eg entertainment/car / travel / uniform / laundry / meals)
- ☐ Lump sum termination payments
- ☐ Government pensions and allowances
- ☐ Payment summaries for superannuation lump sum payments
- ☐ Interest (tip: check internet banking) and dividends
- ☐ Payment summary for employee share plans or other pensions
- ☐ Distributions from partnerships or trusts, including managed funds
- ☐ Details of investment assets sold, such as shares or real estate

WORK EXPENSES

- ☐ Use of own motor vehicle for business travel
- ☐ Other business travelling expenses (car parking, road tolls, accommodation)
- ☐ Purchasing of protective clothing or uniforms
- ☐ Sun protection expenses
- ☐ Self-education expenses (related to your current job)
- ☐ Home office running expenses
- ☐ Telephone expenses
- ☐ Depreciation of library, tools, business equipment, percentage of home computer
- ☐ Tools of trade
- ☐ Subscriptions to trade magazines
- ☐ Union membership

EXPENSES RELATING TO INVESTMENT INCOME

- ☐ Account keeping fees
- ☐ Ongoing management fees
- ☐ Interest on borrowing to buy shares
- ☐ Advice relating to changing and managing investments (but not setting them up)
- ☐ Investment publications (e.g. financial review, magazines, not ordinary newspapers)

EXPENSES - OTHER

- ☐ Donations
- ☐ Income Protection Insurance Premiums (not claimable if policy is held in super)

RENTAL PROPERTIES

Key documents required

- ☐ Rental Summary *from agent* – or if not using an agent, your record of rent received
- ☐ Interest paid (most banks will provide a total online or on your June bank statement)
- ☐ Body Corporate / Insurance costs
- ☐ Land Tax notice
- ☐ Depreciation report from a quantity surveyor
- ☐ Advertising Cleaning, gardening, pest control
- ☐ Council/water rates Insurance
- ☐ Property agent fees Printing, postage and stationery
- ☐ Repairs and maintenance (itemised list with receipts)

It is important to itemise repairs & maintenance so we can distinguish between amount that are immediately deductible and amounts that must be written off over time

ADDITIONAL INFORMATION WHERE APPLICABLE

- ☐ Bank Account details (BSB, Account Number and Account Name) – For your refund
- ☐ Private health cover statement
- ☐ Spouse details
Date of birth, taxable income, fringe benefits, reportable super contributions
- ☐ Dependent details, DOB and separate net income
- ☐ Any other information that you may consider relevant