

Personal Tax Return Checklist

For salary & wage earners - income year 2025-26

Proposed Federal Budget Measures

Certain tax measures announced by the Federal Government are subject to legislation. Trinity Accounting Practice will assess your eligibility once those measures are enacted. This checklist reflects current law for the 2025-26 income year.

My preference: ☐ Standard \$1,000 (if enacted) ☐ Itemised actual expenses

If you choose Itemised actual expenses, please complete the Work-Related Deductions section below.

Your Details

Full Name		Email	
Mobile		Income Year	

Income - please provide

☐ PAYG income statements (all employers)	\$	
☐ Allowances, bonuses, commissions, director fees	\$	
☐ ETP / termination / redundancy summaries	\$	
☐ Centrelink / pension / paid parental leave	\$	
☐ Bank & term deposit interest	\$	
☐ Dividends (incl. DRP) and managed fund tax statements	\$	
☐ Rental property income	\$	
☐ Capital gains - shares, property contracts	\$	
☐ Cryptocurrency purchases, sales, staking or rewards	\$	
☐ Business / partnership / trust distributions	\$	
☐ Rental Property Schedule attached	\$	

Foreign Assets & Income

Australian residents are taxed on worldwide income. Please disclose all foreign holdings and earnings.

☐ Foreign bank accounts (closing balance & interest earned)	\$	
☐ Overseas shares or investments (dividends, distributions, sales)	\$	
☐ Overseas pension income	\$	
☐ Other foreign income - employment, rental, royalties	\$	

Capital Gains Schedule (if applicable)

Complete a row for each asset sold during the year (shares, crypto, property). Bring contracts where available.

Asset description	Date purchased	Date sold	Cost base \$	Sale proceeds \$
☐			\$	\$
☐			\$	\$
☐			\$	\$

Work-Related Deductions (only if itemised)

Please note: Not all employees will be able to claim all the items listed. For advice tailored to your own circumstances, talk to our team.

☐ Motor vehicle - logbook or cents-per-km records		\$	
☐ Work travel - diary, fares, accommodation, meals		\$	
☐ Uniform / PPE / compulsory branded clothing		\$	
☐ Laundry for eligible work clothing		\$	
☐ Self-education directly related to current role		\$	
☐ Working from home diary or record of hours worked from home	Hours	\$	
☐ Phone & internet - work-use percentage		\$	
☐ Union fees, professional memberships, journals		\$	

Other work-related - please describe (one per line):

1.		\$	
2.		\$	
3.		\$	
4.		\$	
5.		\$	

Capital work-related items over \$300 (depreciable - laptop, tools, equipment):

Item description	Date purchased	% work	Amount \$
☐		%	\$
☐		%	\$
☐		%	\$

Other Deductions & Offsets

☐ Tax agent fees & cost of managing tax affairs	\$	
☐ Personal super contributions (with intent-to-claim notice)	\$	
☐ Donations \$2+ to deductible gift recipients	\$	
☐ Investment loan interest & deductible advice fees	\$	
☐ Income protection premiums (outside super)	\$	
☐ Dependants (children / students under 21)	\$	

Do you have Private Health Insurance hospital cover?

☐ Yes

☐ No

(if Yes, the details will come automatically from the ATO pre-fill report - no need to attach)

☐ Spouse details

Name		DOB		Taxable income \$	
------	----------------------	-----	----------------------	-------------------	----------------------

Records to Keep - please note

Keep all tax invoices, receipts and supporting records for FIVE years from lodgement. This includes your 12-week motor vehicle logbook (valid 5 years if pattern unchanged), home-office hours diary (evidence IS required), and CGT records (purchase contract, settlement statement and improvement costs). New clients - please bring your prior year Notice of Assessment so we can confirm carried-forward losses, HELP balance and PAYG instalment history.

Declaration

I declare the information provided is complete and accurate to the best of my knowledge.

I acknowledge that Trinity Accounting Practice reserves the right to review the claimed deductions in accordance with the most current Australian Taxation Office (ATO) rules, rulings and substantiation requirements before lodgement.

Tip: open this PDF in Adobe Reader and use Fill & Sign to draw, type or insert your signature.

Name		Signature		Date	
------	----------------------	-----------	----------------------	------	----------------------

Send to Trinity

When complete, click Email to Trinity to send this checklist, or use File > Print to produce a paper copy.

Email to Trinity

Print / Save

Email goes to: admin@trinitygroup.com.au - Or save as PDF and upload via your SuiteFiles portal.