

Tax Checklist — Hospitality Workers

For salary & wage earners - income year 2025-26

Income

- ☐ PAYG income statements (all employers)
- ☐ Pensions / government payments / allowances
- ☐ Bank interest earned during the year
- ☐ Dividend statements
- ☐ Rental property income
- ☐ Capital gains (shares, crypto, property)
- ☐ Business / partnership / trust distributions

General Work Expenses

- ☐ Compulsory uniform (shirt, vest, apron) and laundering
- ☐ Non-slip shoes
- ☐ Bar tools (cocktail shakers, openers, jigger)
- ☐ RSA, RCG certificates and renewals
- ☐ Coffee / barista training courses
- ☐ Self-education (hospitality CPD, wine certifications)
- ☐ Industry subscriptions
- ☐ Union fees and association memberships
- ☐ Travel between venues
- ☐ Phone for work coordination (work %)

Other Expenses

- ☐ Personal car expenses (logbook or cents-per-km)
- ☐ Travel expenses (flights, taxis, fares for work / training)
- ☐ Accommodation while working away from home
- ☐ Phone and internet (work-use percentage)
- ☐ Computer / laptop (work-use percentage)
- ☐ Home office / working-from-home hours diary
- ☐ Self-education expenses (work-related)
- ☐ Last year's tax return preparation fee
- ☐ Income protection insurance premiums (outside super)
- ☐ Rental property expenses (rates, body corp, agent fees, interest, repairs, depreciation)
- ☐ Investment expenses (bank fees, adviser fees, borrowing costs)
- ☐ Records of share, business or property sales / purchases
- ☐ Private health insurance details
- ☐ Spouse and children details (DOB, Centrelink benefits)
- ☐ Government debts (HELP, Centrelink, Child Support)
- ☐ Charity donations of \$2 or more (DGRs)

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 at Trinity Accounting Practice.