

Tax Checklist — Real Estate Agents

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

- ☐ Mobile phone and internet (high work usage)
- ☐ Vehicle expenses (logbook - extensive client driving)
- ☐ Marketing materials (business cards, flyers, signage)
- ☐ Sales training and CPD courses
- ☐ REI / REINSW membership and fees
- ☐ Licence renewals (sales rep, Class 1 / Class 2)
- ☐ Property inspection equipment (camera, measuring tools)
- ☐ Compulsory uniform with logo (NOT regular business attire)
- ☐ Open home supplies (signage, refreshments)
- ☐ Subscriptions (RP Data, CoreLogic, Domain Realestate.com.au)
- ☐ Travel between properties

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.