

Tax Checklist — Retail Employees

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 with employer logo and laundering
- ☐ Non-slip shoes (where compulsory)
- ☐ Equipment for stock handling
- ☐ Union fees, association memberships
- ☐ Self-education courses
- ☐ Industry journals and subscriptions
- ☐ Travel between stores
- ☐ Phone (work-use percentage)
- ☐ Sun protection (outdoor / market retail)
- ☐ Repair and maintenance of work equipment

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.