



Individual Tax Return Information Checklist 2026

**SPECTRUM
ACCOUNTANTS**
Growing business

Client name: _____

Email: _____

Supplied N/A

- | | | |
|--|--------------------------|--------------------------|
| 1) Lump Sum and Termination payments | ☐ | ☐ |
| 2) Government pensions, allowances & assessable payments. | ☐ | ☐ |
| 3) Other pensions &/or annuities | ☐ | ☐ |
| 4) Tax statements of managed investment funds | ☐ | ☐ |
| 5) Interest income from banks and building societies | ☐ | ☐ |
| 6) Dividend statements for dividends received | ☐ | ☐ |
| 7) Contracts and details of shares sold or purchased | ☐ | ☐ |
| 8) Contracts and details of investment real estate sold or purchased | ☐ | ☐ |
| 9) Rental property statements from real estate agent and details of other expenditure incurred. See our website for a more detailed rental checklist* | ☐ | ☐ |
|  Warning! ATO is continuing their target on rental property deduction errors in 2026 | | |
| 10) Work related expenses including (broadly)  Warning! 2026 ATO area of scrutiny | ☐ | ☐ |
| ✦ Car expenses | ☐ | ☐ |
| ✦ Travel expenses | ☐ | ☐ |
| ✦ Clothing & laundry expenses | ☐ | ☐ |
| ✦ Home office diary hours | ☐ | ☐ |
| ✦ Self-education expenses | ☐ | ☐ |
| ✦ Other work-related expenses | ☐ | ☐ |
| ✦ Calculations / estimates of work-use percentages | ☐ | ☐ |
| Refer to the Spectrum website for a more detailed checklist for this item; | | |
| 11) Motor vehicle logbook (where required) | ☐ | ☐ |
| 12) Donations to charities (registered deductible gift recipients only) | ☐ | ☐ |
| 13) Income protection premiums paid (statements) | ☐ | ☐ |
| 14) Spouse Income Tax Return (if not prepared by Spectrum) | ☐ | ☐ |
| 15) Number of dependent children and amount of child support paid (if applicable) | ☐ | ☐ |
| 16) Personal Superannuation contributions (if claiming a deduction) | ☐ | ☐ |
| 17) Whether you sold your home during the year | ☐ | ☐ |
| 18) Crypto-currency trading information and holding value at 30 June 2026 | ☐ | ☐ |
|  Warning! 2026 ATO area of scrutiny | | |
| 19) Anything else you feel may be relevant | ☐ | ☐ |



Note! The ATO are *again* targeting undeclared income from the sharing economy, so make sure that you include information for income sources such as short-term rental platforms, ride-sharing, delivery services, and online freelancing.



Note that the \$1,000 work-related expense standard deduction is now passed in Parliament but does not commence until the 2026/27 Tax Return.

Please attach this checklist with your 2026 tax information.

* If you are having trouble obtaining any additional information or checklists from our websites, please call our office and we will be happy to arrange for paper copies to be sent to you.