

2026 Tax Return Checklist for Individuals

We aim to provide high quality accounting, tax and business services to individuals, small to medium businesses & SMSFs.

We offer a complete suite of services tailored to suit your personal situation, including:

- Tax returns & tax advice
- Accounting for Sole Traders, Trusts & Companies
- Accounting & administration services for Self Managed Super Funds
- Business planning
- Corporate administration
- Bookkeeping



This information is general in nature only and does not take into account your personal objectives, financial situation or needs. Please consider this information in the context of your personal situation.

Information current at time of writing.

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Liability Limited by a scheme approved under Professional Standards Legislation

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What paperwork is relevant for my tax return?

Your documents can be provided to us in hard copy or electronic format:

- ☐ **Make an appointment** with one of our friendly tax professionals;
- ☐ **Call in** to our office at Slacks Creek;
- ☐ **Email** to info@power2brisbane.com.au;
- ☐ **Upload** via the secure client area of our website: www.power2brisbane.com.au

1. Provide your bank account details.

Are you expecting a refund? We'll need your bank details including **BSB, account name** and **account number**

2. General information:

- ☐ Income statement available via myGov (previously known as PAYG payment summaries or Group Certificates)
- ☐ Bank account details (see #1 above) and details of any interest received
- ☐ Dividend statements for any dividends received during the financial year
- ☐ Employee Share Scheme payment summaries
- ☐ Tax Statement for any managed funds
- ☐ Receipts for work related expenses
- ☐ Receipts for donations to registered charities
- ☐ Receipt from a registered tax agent for your last tax return fee if not prepared by Power2
- ☐ Full details of your partner's income
- ☐ Private Health Insurance Tax Statement, if applicable
- ☐ Letter/statement detailing your tax deductible income protection insurance premiums
- ☐ Details of any business income and expenses
- ☐ Work from Home Hours with diary records and at least 1 invoice to prove your connection with the expense incurred
- ☐ Motor Vehicle kilometres travelled for work related trips
- ☐ Are you claiming a personal superannuation contribution? You must send an intent to claim form to your superannuation fund and have received their notice of acknowledgment

3. Have you received any rental income?

- ☐ Date first rented
- ☐ Real Estate Agent Annual Statement
- ☐ Details of rental income received

- ☐ Receipts for rates, water, land tax, insurance, body corporate, pest control and advertising
- ☐ Details of interest incurred on loans used to purchase the rental property
- ☐ Receipts for repairs or improvements or appliance purchases
- ☐ Last year's tax return (if the property was rented last year and this was not prepared by Power2)
- ☐ All purchase documentation (for newly acquired rental properties)
- ☐ Depreciation report (if you have one)

4. Have you sold an investment property or vacant land?

- ☐ Sale contract and settlement statement
- ☐ Purchase contract
- ☐ Legal fees and stamp duty paid on purchase
- ☐ Receipts for Building and Pest Reports
- ☐ Receipts for improvements
- ☐ History of rates paid (vacant land only)
- ☐ Receipts for advertising
- ☐ Receipts for Real Estate Agent commission paid and other selling costs

5. Have you sold any shares, managed funds, or other investments?

- ☐ Contract/statement for sale
- ☐ Contract/statement for purchase
- ☐ Purchase price for shares/units sold that were acquired via dividend/distribution reinvestment
- ☐ Details of any share/unit consolidations, mergers, demergers or rights issues
- ☐ Details of any brokerage or other costs incurred in purchasing or selling holdings

6. Have you disposed of any cryptocurrency?

- ☐ Statements or any other transaction records for any buys, sells, swaps, exchanges or NFT disposals

7. Do you need a Medicare Levy Exemption Certificate?

If you are a temporary resident, were not an Australian citizen, do not ordinarily live in Australia or were a member of a diplomatic mission, you may be eligible for an exemption from Medicare Levy. For more information contact Medicare on 13 20 11.

This is not an exhaustive list. Other information may be required that is relevant to your particular circumstances. We recommend that you obtain your own records to support the information declared in your tax return. The tax agent pre-fill report, while it may contain some of the required information, is not always available and may be incomplete.