Rubiix Business Accountants

Individual Tax Return Checklist

2026 Income Year | 1 July 2025 to 30 June 2026

How to complete this checklist

1. **Open it in Adobe Acrobat Reader.**
   Save this file to your computer and open it in the free Adobe Acrobat Reader. Web browsers and some preview apps may not save your answers or unlock the boxes.
2. **Answer Yes or No to every question.**
   Ticking the answer that applies unlocks the tick boxes and comment box for that question. Not sure? Tick Yes and explain in the comment box - we'll work it out with you.
3. **Upload your documents to your secure folder.**
   Use the secure online folder link we emailed you for income statements, receipts and other records. Documents cannot be attached to this form.
4. **Save and upload this checklist.**
   When you're finished, save this completed form and upload it to the same folder.
5. **Keep your TFN out of the form.**
   Please do not write your tax file number in this form or in emails. We already hold it securely.

1. About you

Full legal name (as recorded by the ATO)

Mobile number

Email address

Have your residential or postal address, phone number or email changed since your last tax return? ◯ Yes ◯ No

If yes: Please provide your new details.

Would you like your tax refund paid into a different bank account from last year? ◯ Yes ◯ No

If yes: Account name, BSB and account number for your refund.

Did you have a spouse (married or de facto) at any time during the year? ○ Yes ○ No

We need your spouse's details to work out the Medicare levy surcharge and private health insurance rebate.

If yes: Spouse's full name, dates of the relationship if it started or ended during the year, and their approximate taxable income.

Did you have any dependent children or other dependants during the year? ○ Yes ○ No

If yes: Number of dependants and their ages. Tell us if any child aged 18-24 was a full-time student.

Did you arrive in, leave, or live outside Australia at any time during the year? ○ Yes ○ No

If yes: Dates of arrival or departure, the country, and the reason (e.g. work, study, holiday).

Do you have a HELP, VSL, SFSS or other study or training support loan? ○ Yes ○ No

Have you received any letters, notices or amended assessments from the ATO since your last return? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded a copy to the folder

If yes: Briefly describe what the letter was about.

2. Income

Did you receive salary or wages? ○ Yes ○ No

Your income statement is available in myGov. We will compare it with ATO records.

If yes, tick all that apply:

- ☐ My income statement(s) show as 'Tax ready' in myGov (if known)

If yes: Employer name(s). Tell us if you changed jobs or had more than one employer.

Did you receive any bonuses, allowances, back pay, termination, redundancy or unused leave payments? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded any termination (ETP) or lump sum statements

If yes: Type of payment and the employer that paid it.

Did you receive any Centrelink or other government payments (e.g. JobSeeker, Age Pension, Carer Payment, Parental Leave Pay)? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded my Centrelink payment summary (if available)

If yes: Type of payment(s) received.

Did you earn interest from bank accounts, term deposits or other investments? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded interest statements or summaries

If yes: Bank name(s). Tell us if any accounts are held jointly and your share (e.g. 50%).

Did you own shares that paid dividends? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded all dividend statements
- ☐ Some shares are on a dividend reinvestment plan (DRP)

If yes: Company names and whether shares are held in your sole name or jointly.

Did you receive distributions from managed funds, ETFs or other unit trusts? ○ Yes ○ No

Annual tax statements are often not issued until July to September.

If yes, tick all that apply:

- ☐ I have uploaded the annual tax statement for each fund

If yes: Fund name(s).

Did you receive a distribution from a family trust or partnership? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded the distribution statement or minutes (if available)

If yes: Name of the trust or partnership, and whether Rubiix prepares its tax return.

Did you carry on a business or work as a sole trader or contractor using your own ABN? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded income and expense records (or bank statements)
- ☐ I am registered for GST
- ☐ I have uploaded details of business assets bought or sold

If yes: Type of business and anything significant this year (e.g. started or stopped, bought a vehicle, employed staff).

Did you earn income through online platforms or apps (e.g. ride-sourcing, food delivery, short-term accommodation, selling goods online)? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded my platform earnings and expense reports

If yes: Platform(s) used and the type of work or activity.

Did you own a rental property (including a holiday home rented out) at any time during the year? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I received an annual statement from my property manager / agent
- ☐ I have uploaded all rental income and expense records (agent statement, rates, water, insurance, strata, repairs)
- ☐ I have uploaded loan statement(s) showing interest charged for the year
- ☐ I have a depreciation (quantity surveyor) report, or have uploaded a new one
- ☐ I bought, sold or refinanced a rental property during the year

If yes: Property address and your ownership %. Number of weeks the property was available for rent, any weeks used privately, and details of any repairs or improvements over $1,000. If sold, tell us the sale date.

Did you sell or dispose of any assets, such as shares, property, cryptocurrency, collectables or other investments? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded purchase and sale contracts or broker confirmations
- ☐ I have uploaded records of associated costs (stamp duty, legal fees, brokerage, improvements)

If yes: What you sold, and the dates you bought and sold it.

Did you buy, sell, swap, stake or earn any cryptocurrency during the year? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded transaction reports from each exchange or wallet

If yes: Exchange(s) and wallet(s) used.

Did you receive any income from overseas (e.g. foreign employment, pensions, rent or investments)? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded statements showing the income and any foreign tax paid

If yes: Country, type of income and any foreign tax paid.

Did you receive a superannuation pension, annuity or lump sum payment? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded the payment summary from my super fund

If yes: Name of the super fund.

Did you receive any other income not listed above (e.g. employee share scheme, prizes, royalties, compensation payments)? ○ Yes ○ No

If yes, tick all that apply:

- ☐ I have uploaded supporting documents

If yes: Describe the income and the amount received.

3. Deductions

Did you use your own car for work-related travel? ○ Yes ○ No

Normal travel between home and your regular place of work is generally private, even if you live a long way away or start work early.

If yes, tick all that apply:

- ☐ I kept a logbook (12 continuous weeks, within the last 5 years)
- ☐ I have uploaded my logbook and car expense records (fuel, rego, insurance, servicing, loan or lease)
- ☐ I have a record of how I worked out my work kilometres

If yes: Car make, model and year. Number of work kilometres and what the trips were for (e.g. travel between work sites, carrying bulky tools).

Did you pay for other work-related travel (e.g. parking, tolls, taxis, flights, or accommodation and meals while travelling overnight)? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded receipts

If yes: Describe the travel, its purpose and the costs. Tell us if your employer paid you a travel allowance.

Did you buy, hire or clean a compulsory uniform, occupation-specific clothing or protective clothing? ◯ Yes ◯ No

Plain clothing (e.g. black trousers, business suits) is generally not deductible, even if your employer requires you to wear it.

If yes, tick all that apply:

- ☐ I have uploaded receipts

If yes: Items and costs. For laundry, tell us how many work loads you wash per week.

Did you buy tools, equipment or protective items for work (e.g. safety boots, sunscreen and hats for outdoor work, laptop, tools)? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded receipts
- ☐ Some items cost more than $300 each

If yes: Items purchased, cost, and the percentage used for work.

Did you use your personal mobile phone or home internet for work? ◯ Yes ◯ No

If yes, tick all that apply:

- ☐ I have uploaded bills, or a 4-week diary showing my work use

If yes: Monthly cost and estimated work-use %. Tell us if your employer reimbursed any of the cost.

Did you work from home to carry out your employment duties? ◯ Yes ◯ No

Under the fixed rate method you must keep a record of ALL actual hours worked from home for the whole year (e.g. timesheet, roster or diary). Estimates are not accepted.

If yes, tick all that apply:

- ☐ I kept a record of all hours worked from home
- ☐ I have uploaded my record of hours
- ☐ I bought equipment or furniture for my home office

If yes: Total hours worked from home for the year, e.g. 16 hours per week for 46 weeks.

Did you pay for courses, training, seminars or study directly related to your current job? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded receipts or invoices

If yes: Course name and how it relates to your current work.

Did you pay union fees, professional memberships, registrations, licences or work-related subscriptions? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded receipts (union fees may appear on your income statement)

If yes: Organisation(s) and amounts.

Did you donate $2 or more to registered charities (deductible gift recipients)? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded receipts

If yes: Charity names and amounts. Tell us if you donated through workplace giving.

Did you pay income protection insurance premiums personally (not through your super fund)? ○ Yes ○ No

Life, trauma and TPD cover are not deductible.

If yes, tick all that apply:

☐ I have uploaded the premium statement for the year

If yes: Insurer name.

Did you make personal (after-tax) contributions to super that you want to claim as a tax deduction? ○ Yes ○ No

You must give your fund a 'Notice of intent to claim' and receive its written acknowledgement BEFORE we lodge your return.

If yes, tick all that apply:

☐ I have lodged a notice of intent with my super fund

☐ I have received and uploaded my fund's acknowledgement letter

If yes: Super fund name and amount contributed.

Did you have expenses relating to your investments (e.g. interest on a share loan, investment advice fees)? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded statements or invoices

If yes: Describe the expense and the investment it relates to.

Did you pay any costs of managing your tax affairs other than our fees (e.g. another adviser, ATO interest charges)? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded invoices or statements

If yes: Who you paid and the amount.

Do you have any other expenses you think may be deductible? ○ Yes ○ No

If yes, tick all that apply:

☐ I have uploaded receipts

If yes: Describe the expense and how it relates to earning your income.

4. Other information

Did you hold private hospital cover at any time during the year? ○ Yes ○ No

Extras-only cover does not count for the Medicare levy surcharge.

If yes, tick all that apply:

☐ I held hospital cover for the full year

☐ I have uploaded my private health insurance tax statement

If yes: Health fund name and the people covered under the policy.

Did you contribute to your spouse's super fund? ○ Yes ○ No

If yes: Spouse's super fund name and the amount contributed.

Did you live or work in a remote or isolated area of Australia for more than 183 days during the year? ◯ Yes ◯ No

If yes: Town or location and the dates you were there.

Is there anything else you would like us to know, or any question for our team? ◯ Yes ◯ No

If yes: Your comments or questions.

5. Documents and declaration

I declare that the information I have provided is true, correct and complete to the best of my knowledge, and that I have kept the records needed to support the income and deductions I have told you about. I understand Rubiix Business Accountants will rely on this information to prepare my tax return, and that I will review and approve the return before it is lodged. Typing your name below confirms this declaration.

- ☐ I have uploaded all my supporting documents to the secure folder link provided by Rubiix.
- ☐ I will save this completed checklist and upload it to the same folder.

Full name **Date**

Thank you. We'll review your information and contact you if we need anything else. We will also send you a fee estimate before work commences.