Sphere
Accountants & Advisors

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2026 Tax Return Checklist

For the 2025–26 income year: 1 July 2025 to 30 June 2026

Tick off what applies to you and bring these documents to your appointment, or email them to us. Prefer to do it online? Complete our secure form at **thespheregroup.com.au/tax-return-checklist** and your details go straight to your Sphere accountant.

1. Your details

- [ ] Full name, date of birth, phone and email
- [ ] Current mailing address
- [ ] Spouse or partner details (if applicable)
- [ ] Bank account details for your tax refund
- [ ] Private health insurance statement (if applicable)

2. Income

- [ ] Income statement or payment summaries (from myGov or your employer)
- [ ] Interest, dividends and distribution statements
- [ ] Details of any other income or foreign income
- [ ] Bank, loan and credit card statements showing balances as at 30 June 2026

3. Work-related expenses

- [ ] Receipts for work tools and equipment
- [ ] Working from home: a record of the hours you worked from home (fixed rate method is 70 cents per hour for 2025–26), or receipts if using actual costs
- [ ] Work-related self-education expenses
- [ ] Other work-related expenses (uniforms, memberships, subscriptions, phone)

4. Car expenses

- [ ] **Logbook method:** a copy of your logbook plus fuel, insurance, registration, servicing and repair records
- [ ] **Cents per km method:** your work kilometres (88 cents per km for 2025–26, up to 5,000 km per car)
- [ ] Loan schedule if the car is financed

Trips to and from your normal workplace don't count as work travel.

5. Investment properties

- [ ] Annual rental agent summary for each property
- [ ] Loan statements showing interest from 1 July 2025 to 30 June 2026
- [ ] Quantity surveyor depreciation report (if any)
- [ ] Council rates, water, body corporate fees, insurance and land tax
- [ ] Receipts for repairs and maintenance
- [ ] Purchase or sale documents if you bought or sold a property

6. Shares and cryptocurrency

- [ ] Share buy and sell details, or your broker's annual report pack
- [ ] All cryptocurrency transactions, including swaps between coins

7. Sole trader or business

- [ ] Access to your accounting software, or your cashbook of income and expenses
- [ ] Closing stock and work in progress at 30 June 2026 (at cost)
- [ ] Details of new capital purchases (vehicles, plant and equipment)

8. Other deductions and notes

- [ ] Donation receipts
- [ ] Receipts for any other deductions
- [ ] Anything else we should know about your year

Mornington
99–101 Beleura Hill Road, Mornington VIC 3931
Mon to Fri, 9am to 5pm

Rye
2267 Point Nepean Road, Rye VIC 3941
Tue to Thu, 9am to 5pm

Working for YOU, not the ATO!
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This checklist is general information only and not every item will apply to you. Rates shown are the ATO rates for the 2025–26 income year. Talk to your Sphere accountant about your own circumstances.