



Bridgland & Co

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2026 Individual Income Tax Return Checklist

(Complete One For Each Spouse)

Name:

Tax File Number: ABN:

Are you an Australian resident for tax purposes?

Home Address:

Postal Address if different

Date of Birth:

Telephone: (H) (W) (M)

Email:

Occupation: Superfund:

Spouse Name/TFN/DOB (if applicable)

The ATO will no longer issue cheques for refunds, therefore please provide bank details:

BSB:

Account Number:

Account Holder's Name:

Please select YES or NO for each of the items listed below: If you don't know the answer, mark with a "?". **Provide backup papers for all YES answers.**

ALL WORLDWIDE INCOME MUST BE INCLUDED.

Income – Please provide evidence of all income

- | | |
|---|----------------------|
| 1. Salary or wages | <input type="text"/> |
| 2. Allowances, earnings, tips, director's fees, etc | <input type="text"/> |
| 3. Employer lump sum payments | <input type="text"/> |
| 4. Employment termination payments / Stand down payments | <input type="text"/> |
| 5. Australian Government allowances and payments like Newstart, Youth Allowance, Austudy payment and Jobseeker | <input type="text"/> |
| 6. Australian Government pensions and allowances / JobKeeper | <input type="text"/> |
| 7. Australian annuities and superannuation income streams/pensions | <input type="text"/> |
| 8. Australian superannuation lump sum payments | <input type="text"/> |
| 9. Attributed personal services income | <input type="text"/> |
| 10. Interest earned - worldwide | <input type="text"/> |
| 11. Dividends received and dividend reinvestment plans - worldwide | <input type="text"/> |
| 12. Employee share schemes | <input type="text"/> |
| 13. Distributions from partnerships, trusts and managed funds | <input type="text"/> |
| 14. Personal services income (PSI) - non-employee | <input type="text"/> |
| 15. Net income or loss from business (as a sole trader) | <input type="text"/> |
| 16. Deferred non-commercial business losses | <input type="text"/> |
| 17. Net farm management deposits or repayments | <input type="text"/> |
| 18. Capital gains – include cost/date of purchase/proceeds/date of sale | <input type="text"/> |
| 19. Do you have a controlling interest in a foreign trust or company? | <input type="text"/> |
| 20. Foreign source income (including foreign pensions, rentals, interest, dividends) or any interest in foreign assets or property | <input type="text"/> |
| 21. Rental income or AirBnB income | <input type="text"/> |
| 22. Bonuses from life insurance companies or friendly societies | <input type="text"/> |
| 23. Forestry managed investment scheme income | <input type="text"/> |
| 24. Foreign exchange gains/losses on foreign currency bank or loan accounts – provide all statements of foreign currency bank accounts or loans | <input type="text"/> |
| 25. Other income (please specify) e.g. income protection benefit received, royalties and some prize winnings | <input type="text"/> |
| 26. Do you have foreign assets worth more than AUD\$50k? | <input type="text"/> |

Deductions – Please provide evidence and receipts

Where deductions are more than \$300 in total, receipts must be kept for five years.

D1. Work related car expenses – excluding travel from home to work

- ☐ Business km travelled km
- ☐ Total km travelled km
- ☐ Have you kept a Log book kept for 12 weeks in the last 5 years?
- ☐ Original purchase price \$

D2. Work related travel expenses – employees only

- ☐ Did you receive a travel allowance?
 - ☐ If so, did you spend this fully on deductible expenditure?
 - ☐ If you spent more than the allowance, do you have receipts?
- ☐ If you did not receive an allowance:
 - ☐ Did you incur and have receipts for airfares?
 - ☐ Did you incur and have receipts for accommodation?
 - ☐ Do you have receipts for hire cars (if applicable)?
 - ☐ Did you incur and have receipts for meals and incidental expenses?
- ☐ Do you have any other travel expenses?
- ☐ If your spouse travelled with you, or if trip was partly for private purposes, please detail

D3. Work related uniform and protective clothing expenses – note: no claim allowed for generic clothing or shoes

- ☐ Protective clothing
- ☐ Occupation specific clothing (must have registered work logo)
- ☐ Non-compulsory uniform (must have registered work logo)
- ☐ Compulsory uniform
- ☐ Laundry expenses for uniforms (up to \$150 without receipts)
- ☐ Dry cleaning expenses for uniforms
- ☐ Other claims such as mending/repairs, etc (please specify)

D4. Work related self-education expenses

- | | |
|--|----------------------|
| ☐ Union fees | <input type="text"/> |
| ☐ Course fees – Detail course below | <input type="text"/> |
| ☐ Books, stationery | <input type="text"/> |
| ☐ Seminars | <input type="text"/> |
| ☐ Travel | <input type="text"/> |
| ☐ Other (please specify) | <input type="text"/> |

D5. Other work related expenses – Business proportions only

- | | |
|--|----------------------|
| ☐ Home Office expenses <input type="text"/> hours per week
(note: detailed daily diary required) | <input type="text"/> |
| ☐ Computer consumables and stationery, if not using fixed hourly rate | <input type="text"/> |
| ☐ Internet / Telephone / mobile phone, if not using fixed hourly rate | <input type="text"/> |
| ☐ Tools and equipment | <input type="text"/> |
| ☐ Subscriptions and union fees | <input type="text"/> |
| ☐ Journals/periodicals | <input type="text"/> |
| ☐ Equipment purchased | <input type="text"/> |
| ☐ Sun protection products (ie sunscreen and sunglasses), PPE | <input type="text"/> |
| ☐ Other (please specify) | <input type="text"/> |
| ☐ Have any of the expenses above been reimbursed by your employer? | <input type="text"/> |

Other types of deductions

- | | |
|---|----------------------|
| D6. Low value pool depreciation deduction | <input type="text"/> |
| D7. Expenses incurred earning interest | <input type="text"/> |
| D8. Dividend deductions e.g. margin loan interest, investment advice fee | <input type="text"/> |
| D9. Gifts or donations to Australian charities | <input type="text"/> |
| D10. Cost of managing tax affairs/ATO audit insurance | <input type="text"/> |
| D11. Deductible amount of undeducted purchase price of a foreign pension or annuity | <input type="text"/> |

D12. Did you make personal superannuation contributions for which you wish to claim a deduction?
e.g. not paid via payroll ☐

Full name of fund: Account No.

Fund ABN: Fund TFN:

Have you provided the fund a notice of intention to deduct the contribution? ☐

Has this notice been acknowledged by the fund? (Attach copy) ☐

D13. Deduction for infrastructure project pool ☐

D14. Forestry managed investment scheme deduction ☐

D15. Other deductions (please specify) e.g. income protection premium paid,
forex loss, startup expenses

L1. Tax losses of earlier income years ☐

Tax offsets/rebates

T1. Are you of aged pension age ☐

T2. Did you receive an Australian superannuation income stream? ☐

T3. Did you make a spouse super contribution? If so, provide spouse's
super statement showing receipt ☐

T4. Do you receive the offset for living in a remote or isolated area or serving
overseas with the defence forces? ☐

T5. Did you maintain a dependant who is unable to work due to invalidity
or carer obligations? ☐

T6. Are you entitled to claim the landcare and water facility tax offset? ☐

T7. Are you involved in early stage venture capital limited partnerships? ☐

T8. Are you an early stage investor in an "early stage innovation company"? ☐

T9. Did you and your dependants have private health insurance in 2026? ☐

Other relevant information

- A. Are you entitled to the Medicare levy exemption or reduction in 2026 eg, non-resident or defence force? (If yes, please specify):

- B. Did you become an Australian tax resident at any time during the 2026 income year? If so what date

- C. Did you cease to be an Australian tax resident at any time during the 2026 income year? If so what date?

Did you have a spouse or de-facto (either sex) at any time during the 2026 income tax year?

From

to

Did you & your spouse live in different countries at any time in the year?

If separated during the year please advise date of separation

- D. Did you receive any family trust distributions, or dividends from private companies?

- E. Dependants

- Did you have care of a dependent child in 2026? (under 21, or age 21 to 24 and full-time student)
- If yes how many?

- F. Income tests information

- Did you receive any tax-free government pensions in 2026?
- Did you pay child support in 2026?

- G. Do you have a foreign currency bank or loan accounts with a combined balance of more than AUD \$250,000? If yes, provide statements for year

- H. Did you convert foreign currency to AUD at any time in the year? If so provide statements and details of transactions

- I. If you or your employer made contributions to your superfund in 2024/2026, provide superfund transaction statement for the year

- J. Did you receive any benefit from an employee share acquisition scheme?

Only complete these questions if we do not prepare your spouse's tax return

- What was your spouse's taxable income for the 2026 income year? \$
- Did your spouse have any reportable fringe benefits amounts for the 2026 income year?
- Does your spouse have any reportable super contributions for the 2026 income year?
- Did your spouse have a total net investment loss (ie, the total of any financial investment loss and a rental property loss) for the 2026 income year?
- Did your spouse pay child support during the 2026 income year?

All to sign and date.

Dated theday of 20.....

.....

Signature of taxpayer

Name (print)