

Individual Tax Return Document Checklist July 2024 - June 2025 Financial Year



We have prepared this Checklist as a guide to help you collect the documents that will help us to prepare your 2025 tax return. As you gather together receipts, statements and other documents, please check them off below and look through the list to see if anything is missing. We hope you find it useful.

Personal Details

New clients – please complete

Continuing clients - please notify us of any changes

Full Name: _____

Main Occupation: _____

Tax file number: _____

Spouse's Name: _____

ABN: _____

Spouse's Date of Birth: _____

Date of Birth: _____

Period that you had a Spouse during the year: _____

Address: _____

Names and Dates of Birth of Dependent children: _____

Phone: _____

Email: _____

Bank account details for potential refund

BSB: _____ Acc. No.: _____

Acc. name: _____

Income

- Final Payment Slip(s) for the Financial Year (PAYG summaries are no longer provided by most employers)
- Employer Lump Sum Payments
- Government allowances and payments – Austudy payment, Youth Allowance, Veteran payments, etc.
- Government Pensions – Age pension, Disability Support Pension, Carer payment etc.
- Interest – Bank account and Term Deposit statements showing interest earned and account number
- Dividend statements
- Partnership and/or Trust Distribution statements, Managed Fund annual tax statements
- Employee Share Scheme statements
- Shares – contract notes for shares bought or sold during the year
- Crypto – Year end tax reports and/or purchase and sale documents
- Purchase and Sale documents for properties/assets sold during the Financial Year (excl. Primary residence)
- Foreign Income
- Income from Sharing Economy- Airbnb, Airtasker, DiDi, Menulog, Uber, etc.
- Any other Income – Director's fees, tips, allowances, royalties, superannuation benefit payments, etc.

Information
Provided

Not
Applicable

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Sole Traders

- Xero files: Send invitation to "Advisor Access and Manage User" to xero@whittleaa.com.au
- MYOB files: Send invitation with 'Administrator' access to myob@whittleaa.com.au
- Cashbook or other accounting records
- Receipts for expenses and assets purchased
- Invoices issued
- Bank statements

Information
Provided

Not
Applicable

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Rental Properties

	Information Provided	Not Applicable
Annual Statement from Property Agent (or other records detailing Rental Income)	☐	☐
Loan statements showing interest paid during the Financial Year	☐	☐
Expenses incurred privately – Water charges, Council rates, Land tax, Insurance premiums, Repairs and maintenance, Gardening, Pest control, Strata levies etc.	☐	☐
Receipts for any works costing over \$300	☐	☐
If Purchased or Sold during year – Settlement statements, Legal fees, Other costs of Sale or Purchase, Loan establishment / Exit fees, Refinancing fees, etc.	☐	☐

Work Deductions

	Information Provided	Not Applicable
Work-related Vehicle expenses – kilometres travelled for work, Vehicle Logbook, information about electric vehicles used for work etc.	☐	☐
Work-related Travel expenses – parking, tolls, taxis, flights, accommodation, etc	☐	☐
Work-related Clothing and Laundry expenses	☐	☐
Work-related Self-Education expenses	☐	☐
Union fees, professional memberships, subscriptions, professional books or journals, etc	☐	☐
Mobile Phone and Internet expenses – total amounts paid and proportion claimed for work	☐	☐
Work from home expenses	☐	☐
- Diary/ record of actual hours worked from 1 July 2024 to 30 June 2025	☐	☐
- Records of working from home expenses e.g. internet, phone, energy, stationery, etc.	☐	☐
Computer or other assets purchased, including proportion used for work	☐	☐
Any other Work-related expenses	☐	☐

Other Deductions

	Information Provided	Not Applicable
Donations to charities and registered Deductible Gift Recipients	☐	☐
Investment expenses – bank fees, management or adviser fees, interest on investment loans, etc	☐	☐
Costs of managing tax affairs (other than Whittle & Associates invoices and ATO interest)	☐	☐
Personal Super Contribution – Notice of Intent to Claim a Deduction and acknowledgement from the fund	☐	☐
Income Protection Insurance premiums	☐	☐

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Extra Information

	Information Provided	Not Applicable
New clients: Copy of last tax return lodged	☐	☐
Private Health Insurance statement (if provided to you)	☐	☐
Spouse's Taxable Income (if tax return is not done by Whittle & Associates)	☐	☐
Did you change your Name during the year?	☐	☐
Did you make any Child Support payments during the year?	☐	☐
Do you have any foreign assets or property?	☐	☐
Did you arrive in or leave Australia permanently during the year? When: _____	☐	☐

If you have any questions about the items on these lists, please do not hesitate to contact us.

I consent to Whittle & Associates preparing my income tax return for the year ended 30 June 2025:

Name: _____

Signature: _____

Date: _____