

CERTIFIED PRACTISING ACCOUNTANTS  
TAX AGENTS

**POSTAL ADDRESS:**  
P.O. Box 465,  
Mt. Ommaney. Q. 4074

## 2026 Electronic Lodgement Checklist

Please ensure you complete ALL questions and provide additional information as necessary on separate sheets and securely attach all documentation to this form. New Clients, please bring Photo ID to your appointment or attach a copy to this checklist.

<b>Full Name</b>	
<b>Tax File Number</b>	<i>(please do not complete if emailing the checklist to us)</i>
<b>Date of birth</b>	
<b>ABN (if applicable)</b>	
<b>Occupation</b>	
<b>Address</b>	
<b>Address (postal)</b> <i>(Put 'as above' if the same)</i>	
<b>Telephone contacts</b>  <i>*please indicate preferred contact</i>	<b>Mobile:</b>
	<b>Business Hours (work) :</b>
	<b>After Hours (home):</b>
<b>Email</b>	
<b>Bank account details</b>	<b>Name of account:</b>
	<b>BSB:</b>
	<b>Account number:</b>

Please circle **YES** or **NO** for each of the items listed below and provide relevant details (if known).

### Spouse details – married or *de facto* (including same sex)

Did you have a spouse for the full year from 1 July 2025 to 30 June 2026? .....YES/NO

If you had a spouse for only part of the income year, please specify the dates between 1 July 2025 to 30 June 2026 when you had a spouse:

From \_\_\_\_ / \_\_\_\_ / \_\_\_\_ to \_\_\_\_ / \_\_\_\_ / \_\_\_\_

What is your spouse's name and date of birth? (If you had more than one spouse during 2026, provide the name of your spouse on 30 June 2026 or your last spouse)

Name: .....

DOB: .....

**IF WE DO NOT PREPARE YOUR SPOUSE'S TAX RETURN, PLEASE ANSWER THE FOLLOWING.**

What was your spouse's taxable income for the 2026 income year?..... \$ \_\_\_\_\_

Does your spouse have a share of trust income ..... YES/NO \$ \_\_\_\_\_

Did a trust or company distribute income to your spouse? ..... YES/NO \$ \_\_\_\_\_

Did your spouse have any reportable fringe benefits amounts for the 2026 income year? ..... - Employer Exempt from FBT ..... YES/NO \$ \_\_\_\_\_

Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2026 income year? ..... YES/NO \$ \_\_\_\_\_

Did your spouse receive any exempt pension income in the 2026 income year? ... YES/NO \$ \_\_\_\_\_

Does your spouse have any reportable super contributions for the 2026 income year?.....  
..... YES/NO \$ \_\_\_\_\_

Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? ..... YES/NO \$ \_\_\_\_\_

Did your spouse receive any foreign income in the 2026 income year?..... YES/NO \$ \_\_\_\_\_

Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2026 income year?..... YES/NO \$ \_\_\_\_\_

**DEPENDANT CHILDREN**

Do you have any Dependant Children YES / NO How many? \_\_\_\_\_

Did your family receive Family Tax Benefit ..... YES/NO

**INCOME**

Payment Summaries and Termination payments (please attach if available) ..... YES/NO

Reportable Fringe Benefits (FBT) ..... YES/NO

Reportable Employer Superannuation Contribution (RESC) ..... YES/NO

Unemployment / Sickness Benefits / Austudy etc - (please attach if available) ..... YES/NO

Centrelink Pensions - (please attach if available) ..... YES/NO

Cryptocurrency-Have you bought/sold or exchanged (please attached taxation statement or workings) YES/NO

Crypto Rewards- Have you received bonus coins/airdrops or rewards (please attach) ..... YES/NO

Interest Received on Bank Accounts (please attached details)..... \$ \_\_\_\_\_

Distributions from Trusts & Managed Investments (please attach yearly taxation statement) ..... YES/NO

Dividends - (attach payment slips for tax credits) ..... YES/NO

Were the shares held for more than 45 days ..... YES/NO

Rental Properties (refer to our website for additional schedule)..... YES/NO

Business Income (please attach) ..... YES/NO

Do you earn income from any ride sharing apps e.g. Uber/Didi/Ola ..... YES/NO

Are you registered for GST ..... YES/NO

If no, when did you start driving ..... / /

Have you prepared and lodged your BAS (please attach)..... YES/NO

Proceeds from cashed in / matured Life Policies,

Insurance or Friendly Society Bonds (attach details) ..... YES/NO

Employee Share Schemes..... YES/NO

Details of sale of assets including main residence, rental property or shares etc ..... YES/NO

If you are under 65, did you withdraw any funds from your superannuation for any reason ..... YES/NO

Any other income ..... YES/NO

**DEDUCTIONS AND REBATES**

The following deductions and tax offsets ('rebates') are available to obtain the maximum refund for you. As these can be complex, we may need to discuss them with you by telephone before completing your return, if you are mailing this to us.

**DEDUCTIONS**

**1. Work related car expenses – we recommend you obtain advice from your Accountant in relation to this.**

– Cents per kilometre method (up to a maximum of 5,000 kms @ 88c/km ..... YES/NO

How many kilometre's \_\_\_\_\_ Vehicle Make & Model \_\_\_\_\_

– Log book method ..... YES/NO

If yes, please provide detailed break up amount to be claimed

– Any other details-Purchased or sold date, energy saving vehicle (electric), or other special details that may be relevant

**2. Work related uniform and other clothing expenses**

Uniform (with logo),protective or “occupation specific” clothing ..... \$ \_\_\_\_\_

Laundry expenses (up to \$150 without receipts) ..... \$ \_\_\_\_\_

Dry cleaning expenses (must have receipts)..... \$ \_\_\_\_\_

Sun protection products (i.e., sunscreen and sunglasses) ..... \$ \_\_\_\_\_

Other claims such as mending/repairs, etc (please specify) ..... \$ \_\_\_\_\_

**3. Work related self-education expenses**Self Education Code *(please circle the code applicable to your situation)*

K Study required for current work    I study for increased income from current work    O Other direct connection to current work

Course taken at educational institution:

- Course fees *(inc VET/HELP Fees)* ..... \$ \_\_\_\_\_
- Books, stationery ..... \$ \_\_\_\_\_
- Hardware *(computers, tablets, iPad etc)* ..... \$ \_\_\_\_\_
- Travel to/ from educational place ..... \$ \_\_\_\_\_
- Other *(please specify)* ..... YES/NO

**4. Other work related expenses** *(please provide full details)*Home office expenses *(refer to our website for additional schedule)*..... YES/NO

Were you required to work from home ? ..... YES/NO

*(between 1 July 2025 and 30 June 2026)* number of hours worked from home .....

Books and Reference materials ..... \$ \_\_\_\_\_

Union Fees ..... \$ \_\_\_\_\_

Telephone/mobile phone ..... \$ \_\_\_\_\_

Tools of Trade ..... \$ \_\_\_\_\_

Professional Memberships ..... \$ \_\_\_\_\_

Any other work related deductions i.e purchase of new computer *(please specify)* ..... \$ \_\_\_\_\_**5. Other Deductions**

Income Protection Insurance ..... \$ \_\_\_\_\_

School Building Fund ..... \$ \_\_\_\_\_

Donations to Charity (Not Art Union) *(please specify)* ..... \$ \_\_\_\_\_

Tax Agent's Fee ..... \$ \_\_\_\_\_

Personal contributions to your super fund *(please attached confirmation letter from super fund)*..... \$ \_\_\_\_\_**Tax offsets/rebates – Please provide evidence**

Are you a senior Australian or pensioner?..... YES/NO

Did you receive an Australian superannuation income stream? ..... YES/NO

Did you make superannuation contributions on behalf of your spouse? ..... YES/NO

Did you live in a remote area of Australia or serve overseas with the Australian

Defence force or the UN armed forces in 2026? ..... YES/NO

Place/Town ..... Number of days Resident .....

Did you maintain an invalid or carer dependant including your spouse, parent,  
Parent-in-law, your or your spouse's child, brother or sister aged over 16 years old? ..... YES/NO

**Private health insurance policy details**

Do you have private health insurance ..... YES/NO

*If YES – please attached statement as provide by your private health insurer if available*

If during the year you married/ separated / divorced. Please ensure that you specify the date on page 2.

**Child Support**

Did you or your spouse pay child support during the 2026 income year? ..... YES/NO

You \$ \_\_\_\_\_ Your Spouse \$ \_\_\_\_\_

**DECLARATION:**

I certify that the above details are true and correct, and disclose a full and complete statement of income and deductions for the year ended 30 June 2026.

I hereby authorise Peter I Price & Associates to prepare and lodge my Income Tax Return by electronic means.

Taxpayer’s Signature \_\_\_\_\_ Date \_\_\_\_\_