Camden Professionals
A part of Investax Group

Individual Information Checklist

2025-2026

camdenprofessionals.com.au

Please note that most of 2025-2026 tax returns are due for lodgment by 15 May 2027 (unless you have been informed otherwise). In order for us to complete your return by the due date, we will require your documentation no later than 1 March 2027.
During peak tax periods our turnaround is 6-8 weeks from when we receive your documentation. If your return is not required urgently, please indicate period that would be suitable:

☐ **Urgent** ☐ **4-6 Weeks** ☐ **6-8 Weeks** ☐ **8-10 Weeks** ☐ **Anytime before Due Date**

GIVEN NAME: ______________________ MIDDLE NAME: ______________________

SURNAME: ______________________ DATE OF BIRTH: ______________________

TAX FILE NUMBER: ______________________ OCCUPATION: ______________________

ADDRESS: ____

HOME PHONE: ______________________ MOBILE: ______________________

ACCOUNT NAME*: ____

BANK BSB NUMBER*: ______________________ BANK ACC* NUMBER: ______________________

EMAIL ADDRESS: ____

NAMES OF DEPENDENT CHILDREN & D.O.B

____

____

____

NAME OF SPOUSE OR PARTNER & D.O.B
(Includes same sex couples) *

____

***COMPULSORY: Please provide your spouse's income, including any Reportable Fringe Benefits and Reportable Superannuation Contributions, if we are not acting as your spouse's tax agent or if we are preparing your spouse's tax return separately at a different time.**

INCOME

ARE YOU AN EMPLOYEE? YES ☐ NO ☐
(Including pensions)

If yes, your PAYG income summaries from your employers will be available via the ATO portal or MY GOV

OTHER INCOME (Includes any business income, director's fee, commissions etc)

____

____

INTEREST RECEIVED

NAME OF BANK	ACCOUNT NUMBER	TOTAL INTEREST RECEIVED $	TFN WITHHOLDING $	JOINT ACCOUNT?

DIVIDENDS

Please provide copies of dividend statements of Income received, including Dividend Reinvestment Plans (DRP)

NAME OF SHARES	NUMBER OF SHARES HELD	AMOUNT RECEIVED $

TRUST AND PARTNERSHIPS

(Eg: BT funds, Vanguard, AXA etc) Name of trust or partnership -

Please provide **Annual Tax Statements**

____

____

CAPITAL GAIN

Did you sell any assets such as shares or property which were acquired after 20 September 1985?

Applicable YES ☐ NO ☐

If yes, please provide documentation of when it was purchased/cost and also documents on sale/funds received, etc.

RENTAL INCOME (including AIRBNB)

Please complete attached rental property statement at the end of this checklist.

EMPLOYEE SHARE/OPTION SCHEME

Did you receive bonus shares/options from your current employer during 2025/2026 ?

YES ☐ NO ☐

If yes, please provide the related correspondences/documents received from the employer.

ANY OTHER INCOME

(Any Income you have received in the financial year that does not fit into any of the above categories. Please provide details.) ***Eg. Interest on any overseas bank accounts or any other foreign income received.***

____

____

____

Do you have any assets over $50,000AUD outside of Australia? YES ☐ NO ☐

DEDUCTIONS

Please ensure you are able to substantiate all claims, even if less than $300.

MOTOR VEHICLE

Did you use your own car for business/work purposes through the year? YES ☐ NO ☐

If yes, then please provide one of the following:

Log Book Method- Business % use (Please ensure you keep a log book for a continuous period of 12 weeks)

Please provide details of all expenses you incurred over the financial year including **fuel, repairs/maintenance, registration/Insurance** etc. In a spread sheet or itemised form and attach it to this checklist.
If you have a loan for the vehicle, please provide figures of your lease payments.

OR

Kilometres Method

You haven't kept a log book but use your car for work. Let us know how many kilometres you would have travelled for work. The maximum the tax office allows you to claim is 5000 Kilometres.

Car Registration Number: ______________________________

Kilometres: ______________________________

WORK UNIFORM

Do you wear: YES ☐ NO ☐

- Protective clothing
- Uniform with a company logo
- Occupation specific clothing

If yes, were you out of pocket through the year for purchasing any new items. (If so please provide details) Laundering and dry cleaning of clothing listed above are claimable.

____

____

SELF EDUCATION

Did you incur any self-education expenses during the financial year? YES ☐ NO ☐

Name of Course ________________________ Institution ________________________

How does it relate to your current employment/employer? ________________________

____

Fees (Excluding **HECS/HELP** debt) ________________________

____

Books/Stationery/Consumables ________________________

Travel ________________________

Internet Amount per month __________ Percentage used for work __________

Home Office Hour Hours per week __________ How many weeks __________

OTHER WORK RELATION DEDUCTIONS

Did you incur any other work-related deductions? YES ☐ NO ☐

☐ Union fees/Professional bodies (List names and amounts) ____________

☐ Diary/Printing/Postage/Stationery ____________

☐ Books and Journals ____________

☐ Seminar costs ____________

☐ Sickness & Accident Insurance/ Income protection (Please supply a copy of the policy ____________

☐ Internet Amount per month ________ Percentage used for work ________

☐ Home Office Hours from 01/07/2025 to 30/06/2026 Hours per week ________ How many weeks ________

☐ Mobile Phone Amount per month ________ Percentage used for work ________

☐ Outdoor workers (Sunglasses/Sunscreen/Hats) Amount ________ Percentage used for work ________

☐ Tools & Equipment-Over $300 (List dates & percentage used or work purpose) ____________

____

OTHER

(Costs you incurred that was directly related to your job.)
Please provide details:

____

Income Protection Insurance YES ☐ NO ☐

Income protection insurance premiums: Amount paid personally outside superannuation during the financial year: $__________.

☐ **I have provided Income Protection Deductibility Statement from my Insurer”**

GIFTS OR DONATIONS YES ☐ NO ☐

Voluntary gifts of $2 of more made to a Deductible Gift Recipient (DGR) Status Organization, please list the name of the organistaion and the amount donated. (This includes School Building Fund donations)

____________ ____________

____________ ____________

TAX OFFSETS

PRIVATE HEALTH INSURANCE

Do you have private health Insurance? YES ☐ NO ☐

Please confirm all your family members (including your spouse and children were covered by private health insurance hospital cover YES ☐ NO ☐

SPOUSE OR PARTNERS TAXABLE INCOME (Includes same sex couples)

Did you have a spouse/partner for the full financial year? YES ☐ NO ☐

Does your spouse/partner receive any benefits from Centrelink? YES ☐ NO ☐

What was your spouse or partner's taxable income*: **$** ____

(Please supply a copy of their PAYG Summary/Group certificate)

*Compulsory

SUPERANNUATION

Did you make any relevant superannuation contributions during the financial year?

YES ☐ NO ☐

a) ☐ I made personal superannuation contributions during the financial year and intend to claim a tax deduction:

Amount: $__________

☐ I have attached the Notice of Intent and acknowledgment from my super fund.

b) ☐ I made contributions to my spouse's superannuation fund during the financial year and would like to claim the spouse superannuation tax offset:

Amount: $__________

☐ I have attached evidence of the contributions.

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Individual Information Checklist

2025-2026

Please complete a separate Rental Property Schedule for each rental property you owned during the year. If you are submitting a real estate agent's annual summary, only include out-of-pocket expenses such as loan interest, insurance, land tax and council rates.

Owner Names & Ownership %: Address of Rental Property:				
Property Type:	☐ Long-term rental	☐ Airbnb / Stayz	☐ Short Term + Holiday Home	☐ Commercial Property
Number of weeks property was rented this year:				

INCOME

Gross rental income	
Other rental related income	
Gross Rent	

EXPENSES	
D Advertising for tenants	
E Body corporate fees (Strata Levies)	
F Borrowing expenses	
G Cleaning	
H Council Rates	
I Capital allowances (depreciation)	
J Gardening/lawn mowing	
K Insurance	
L Interest on loans	
M Land Tax	
N Legal fees	
O Pest control	
P Property agent fees/commission	
Q Repairs and maintenance (R & M)	
(for R & M purchases greater than $300 need details)	
R Capital Work's Deduction (Building)	
S Stationery, telephone and postage	
T Travel expenses (Not allowed after 30/6/2017)	
U Water charges	
V Sundry rental expenses	
TOTAL EXPENSES	

NET RENT	

For Property Purchased This Financial Year, Please Provide the Following:

Settlement Sheet

Bank Loan Offer

First Bank Statement

Transfer Title Documents

First Page Of The Contract For Sale

Depreciation Schedule (if any)

Short-Term Rental Property Assessment (Airbnb / Stayz / Holiday Letting)

This page only needs to be completed if your rental property was available for short-term accommodation (for example Airbnb, Stayz or Booking.com) or was used privately by you, your family or friends during the financial year. This information assists us in determining the correct tax treatment of your property

1. Property Availability & Personal

Use Question	Yes	No	Comments / Supporting Information
Did you keep a record of all dates the property was used by you, your family or friends?	☐	☐	
Was the property unavailable for rent due to private use, maintenance or repairs? If yes, provide the dates.	☐	☐	
Can you provide evidence that the property was genuinely advertised for rent at market rates throughout the year?	☐	☐	

2. Commercial Rental

Activity Question	Yes	No	Comments / Supporting Information
Was the property's primary purpose to generate rental income?	☐	☐	
Did family or friends receive priority booking over paying guests?	☐	☐	
Were rental rates commercially reasonable throughout the year?	☐	☐	
Were peak holiday periods generally made available to paying guests?	☐	☐	

3. Please provide (if applicable)

- ☐ Annual booking statements from Airbnb, Stayz or other booking platforms
- ☐ Occupancy / booking calendar for the financial year
- ☐ Property manager annual summary (if applicable)
- ☐ Personal use log (if maintained)
- ☐ Invoices for major renovations or repairs undertaken during private-use periods

Please ensure that the information you have supplied is correct. The onus is on you the taxpayer to be able to / substantiate the information that you have supplied.

SIGNED: ___________________________________ **DATE:** ____

Please mail your completed forms and supporting documentation (copies of the originals are sufficient) to:

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A part of Investax Group

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A postage fee will be added to your invoice upon the return of bulky items.