

2025 Individual Income Tax Return Checklist



Full Name			
Has your name changed since your last return?	Yes	No	If yes previous name:
Are you an Australian resident?	Yes	No	Email:
Telephone contacts	Home:		Mobile:
Address			
Electronic banking details	BSB:	Account Number:	
	Account Name:		
Main Occupation			
Spouse details if changed	Name:	TFN:	DOB:
Number of Dependents	Number		

Please tick YES or NO for each of the items below - **all supporting documents to be uploaded to the AFYF portal if YES is selected:**

INCOME – Please upload all supporting documents if YES to the AFYF Portal Yes No Provided

Did you earn – Salary or wages

Did your earnings include - Allowances, earnings, tips, director’s fees etc.

Did your earnings include - Employer lump sum payments or Termination payments

Did you have Australian Government pensions or other payments such as Newstart

Did you receive any - Annuities, Superannuation income streams or Lump sums

Did you earn any - Interest

Did you receive - Dividends including any dividends reinvested

Were you part of an Employee share scheme

Do you receive - Distributions from partnerships and/or trusts

Do you operate as a Sole Trader - **See Note #3**

Did you sell or transfer: Property, Shares, Crypto etc (Details needed for purchase & sale of asset)

Did you have any - Foreign source income (including foreign pensions)

Do you own a Rental Property - **See Note #2**

Other income (please specify)



DEDUCTIONS – Please upload all supporting documents if YES to the AFYF Portal

Yes No Provided

Do you have work-related expenses (**not reimbursed by an employer**) for the following:

- Motor vehicle - https://afyf.com.au/index.php/resources/resource_detail/1239
- Travel
- Clothing (Protective, Occupations specific, Compulsory)
- Laundry / Drycleaning
- Education / Seminars / Training
- Union fees, books, stationery, travel, other (please specify)
- Home office expenses - **See Note #1**
- Computer and software
- Telephone/mobile phone/internet
- Tools and equipment
- Subscriptions and union fees
- Journals/periodicals
- Sun protection products, if relevant to your occupation
- Protective equipment including facemasks, sanitiser, COVID Tests
- Any other work-related deductions (please upload relevant information to the AFYF Portal)

Other types of deductions - Please upload all supporting documents if YES to the AFYF Portal

Yes No Provided

Did you have any Interest/Investment deductions

Do you have income protection insurance

Did you make any donations

What was the cost of preparation of last year's tax return

Did you make any direct super contributions

Other deductions (please specify upload relevant information to the AFYF Portal)



Other relevant information - Please upload all supporting documents if YES to the AFYF Portal

Yes No Provided

Were you & your dependents (including Spouse) covered by private health insurance

Did you become an Australian tax resident at any time during the income year? If so, provide date

Did you cease to be an Australian tax resident at any time during the income year? If so, provide date

Did you live/work in remote Australia or serve overseas

NOTES

#1 - Home Office - Please provide all the relevant information so we can determine the best deduction available. All Supporting documents to be uploaded to AFYF Portal

Option One

Yes No Provided

** Workspace must be a space separate to other areas in the home, not used for other purposes (IE: an office)

- Floorspace of the workspace as a % of the whole home (IE provide Sqm of workspace & Sqm of home)

- Actual cost for electricity & gas (provide copies of bills)

- Actual cost of telephone & % for work usage determined by itemising 3 months of bills

- Actual cost of internet with an estimate for business usage %

- Stationery, computer consumables & office equipment costs

Option Two

If you don't have a separate workspace, please use the below:

- A work diary showing dates worked, start & finish times

** NOTE: This method is a flat rate covering hours, telephone, internet, stationery & computer consumables

#2 - Rental Income - Please upload all relevant documents for the below to the AFYF portal

Yes No Provided

Do you have an agent year end summary

Did you pay any expenses directly

** Details can be found - https://www.afyf.com.au/index.php/resources/resource_detail/899

Do you have a depreciation schedule not previously provided

**Please upload mortgage statements for the full year to the AFYF Portal



#3 - Business Income

Yes No Provided

Did you earn income as a sole trader under your own ABN

Do you have details in a data file - EG: Xero - If so, please make sure we can access as your advisor

Do you have details in a spreadsheet

** If not - https://www.afyf.com.au/index.php/resources/resource_detail/1190

If your spouse's Tax Return is not completed by AFYF please provide spouse's taxable income for means testing purposes

Signature of taxpayer

Name (print)

Dated the