

2025 Individual Tax return Checklist

(1 July 2024 to 30 June 2025)

Thank you for engaging our firm to complete your 2025 income tax return. We understand that you would like your results calculated and return finalised in the timeliest manner possible. To assist us in making this possible, please complete the attached checklist.

To ensure our records are as up to date as possible, please complete the following table.

Personal Details			
Full Name		Date of Birth	
Change of address (residential)			
Change of address (postal)			
Change of email			
Change of contact number			
Spouse full name		Spouse Date of Birth	
Spouse taxable income		Number of Children	

Prior to your appointment or advising our office to commence your tax return, please ensure you have all receipts and documents emailed or ready to bring to your appointment. Please contact our office if you have unlodged tax returns from prior years, so we can advise you on your lodgement requirements and deadlines.

At BW Advisers, we understand that everyone's situation is different. Our tailored service will help you minimise your taxation and better manage your financial and business affairs.

By signing and completing this document I hereby authorise BW Advisers to complete my 2025 income tax return. I understand that this checklist is a guide including commonly reported items, and there may be additional items I need to include. I understand that if I am unable to provide proof of purchase for items I wish to claim in my return, no deduction may be claimed. By entering into this engagement, I agree with the terms and conditions, as outlined in the document included on the BW Advisers Website <https://bwadvisers.com.au/>

Signed:

Dated:

Please note: This checklist only covers the most common items in a tax return. Should you require to discuss this checklist or any other tax or accounting matter, please contact our office to request an appointment.

How to use this checklist

Indicate Y or N to each item to let us know if it applies to you this year. If you are unsure, please flag this to be discussed in your appointment.

Attach scanned copies or clear photos (PDF preferred).

Email everything with the subject "Commence Work – 2025 Return"

We'll confirm once we've reviewed your file and schedule a meeting (in-person, Zoom, or phone).

Income

Income Items	Applicable (Y/N)	Comments/Considerations/Info to provide
Wages		Income Statements. Are these finalised?
Dividend Income		Provide one of the following: <ul style="list-style-type: none"> Dividend Statements HIN/SRN and Postcode
Sale of Investments		Rental Property, Holiday House, Shares, Business holdings
Crypto		This includes if you transferred coins between digital wallets
Business Income		Request list of items required for this
Managed Funds		Provide annual tax statement
Rental Income		Request a copy of our rental schedule template
Government Payments		Does not include non-taxable payments such as Family Tax Benefit
Foreign Income		Please provide breakdown of amounts received, currency and dates for conversion

Other Items/Offsets

Item	Applicable (Y/N)	Comments/Considerations/Info to provide	
Private Health Insurance		Does your policy cover your whole family? (circle)	Yes / No
Zone Offset		Did you live and work in a remote area?	
Study Debt		Circle applicable type:	Fee-HELP / HECS / HELP / SFSS
Spouse super		Did you make a super contribution on behalf of your spouse?	
Child Support Paid			

Deductions

This checklist contains a general list of employment-related deductions and should be used as a guide only. The results may vary depending on individual circumstances.

Three Golden Rules

1. You have spent the money yourself and you were not reimbursed
2. The expense was directly related to earning your income
3. You have provided a receipt to our office to prove the expense (As per ATO requirements from 01st July 2025)

Deduction Items	Applicable (Y/N)	Comments/Considerations/Info to provide
Vehicle Costs		Excludes travel between home & work (except for special circumstances). Provide receipts and invoices for all vehicle related expenses.
		Did you keep a logbook? (circle) Yes / No
		How many km did you travel?
		Do you meet the "bulky tools" requirement? (circle) Yes / No
Uniforms		Includes purchases and laundry/maintenance
		Is your uniform mandatory? (circle) Yes / No
		Does it include a work logo? (circle) Yes / No
		Is the item protective? (circle) Yes / No
		Is the item specific to your job? (circle) Yes / No
Travel		Includes meals, flights, accommodation and any other costs incurred directly when travelling for work
		Did you receive an allowance? (circle) Yes / No
		Do you have receipts? Yes / No
		If you do not have receipts, please provide the following for each trip:
		<ul style="list-style-type: none"> • Purpose of travel • Where did you travel? • How many days? • How many meal items: <ul style="list-style-type: none"> ○ Breakfast ○ Lunch ○ Dinner ○ Snacks
Study		Did you pay course fees? (circle) Yes / No
		Do you anticipate a promotion or pay rise upon completion? (circle) Yes / No
Home Office / Working From Home		Actual costs (if not claiming hours): <ul style="list-style-type: none"> • Mobile phone (work %) • Internet (work %) • Electricity (enquire for calculation method) • Other utilities (% of house dedicated to home office) • Stationery & incidental items • Furniture & equipment
		Did you keep a diary of hours? (circle) Yes / No
		Total hours:

Deduction Items	Applicable (Y/N)	Comments/Considerations/Info to provide	
Tools		Any items over \$300 will need to be depreciated. This includes separate items purchased as a “kit” for a discounted price.	
Union Dues			
Professional body fees			
Personal super		After tax contributions made directly to your super fund.	
		Have you lodged an NOI? (circle)	Yes / No
		Has it been acknowledged? (circle)	Yes / No
Income protection		Does not include policies paid in your super fund or Life Insurance policies.	
Donations		Amounts donated above \$2.	
		Is the charity registered? (circle)	Yes / No

For your convenience:

- Phone BW Advisers on (03) 5332 2613 to make an appointment and/or
- Send us your documentation, relevant to the tax checklist provided and we will organise an in person, Zoom or telephone appointment.
- Alternative reply via email with all documentation required and state in Subject line “2025 - Commence Work”.