

Tax Return Document Checklist

For Australian sole traders · 2025–26 income year (1 July 2025 – 30 June 2026)

Tick each item off as you find it. Gather everything below before you sit down to lodge.

Self-lodgement deadline: 31 October 2026

1. Your personal and business details

- ☐ Your tax file number (TFN) and Australian Business Number (ABN)
- ☐ Your myGov account, linked to the ATO, if you're lodging yourself
- ☐ Bank account details (BSB and account number) for your refund
- ☐ Last year's notice of assessment — useful for checking figures

2. Business income records

- ☐ Invoices and sales records for the full year
- ☐ Business bank account statements from 1 July 2025 to 30 June 2026
- ☐ Payouts from platforms such as Stripe, PayPal, Square, Airtasker or rideshare and delivery apps
- ☐ Cash takings, if you accept cash
- ☐ Any government grants or payments you received for your business

3. Business expense records

- ☐ Receipts and invoices for business purchases (stock, materials, tools, software, subscriptions)
- ☐ Car records: a logbook, or business kilometres if using the cents per kilometre method (88c/km in 2025–26, up to 5,000 km per car)
- ☐ Working from home records: diary of actual hours (fixed rate 70c/hour in 2025–26), plus at least one bill for each running expense covered
- ☐ Invoices for equipment purchased, showing the date first used or installed
- ☐ Business insurance, bank fees, advertising and last year's tax agent fees

4. Other income

- ☐ Income statement from any job (in myGov once your employer marks it "tax ready")
- ☐ Bank interest, dividends and managed fund distributions
- ☐ Rental income and expenses, if you own an investment property
- ☐ Records of any shares, crypto or property sold during the year

5. Tax paid, offsets and other deductions

- ☐ Any PAYG instalments paid during the year
- ☐ Your private health insurance statement
- ☐ Personal super contributions you plan to claim, plus your fund's written acknowledgement of your notice of intent
- ☐ Receipts for donations of \$2 or more to registered charities

Tip: Keep a separate bank account just for your business — it makes tax time far faster and gives you clean evidence if the ATO ever asks. Keep all records for 5 years from the date you lodge.