



CGH ACCOUNTING

services

Your 2026 Tax Time Checklist

A simple guide to help you gather the information we need to prepare your tax return.

INCOME

- Income Statements (PAYG)
- Government payments
- Bank interest
- Dividend statements
- Managed fund statements
- Rental income
- Business / ABN income
- Foreign income
- Capital gains events
- Cryptocurrency transactions
- Employee share schemes

DEDUCTIONS

- Motor vehicle expenses
- Travel & accommodation
- Uniforms / workwear
- Self-education
- Professional memberships
- Tools & equipment
- Home office expenses
- Telephone & internet
- Computer expenses
- Donations
- Income protection insurance

INVESTMENTS & RENTAL PROPERTIES

- Rental property schedule
- Property manager statements
- Loan interest details
- Repairs & maintenance
- Depreciation schedules
- Share purchase & sale details

OFFSETS & OTHER INFORMATION

- Private health insurance statement
- PAYG instalments paid
- Spouse income details
- Super contributions
- Bank account details
- Updated contact details

Not sure if something is relevant?

Bring it anyway. We would much rather receive too much information than discover something important after your return has been lodged.

RESPECT • HONESTY • COMMUNICATION

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