

BBC – Fast Tax Data Checklist 2026

	Client Yes No	Office Use
New Clients		
Copies of last year's tax return including any schedules: depreciation, motor vehicle and rental schedules	☐ ☐	
If BBC only completes your return and not your partner's		
Spouses Taxable Income including a breakdown of any rental or investment losses, reportable fringe benefits and reportable employer superannuation contributions.	☐ ☐	
The amount of child support your partner paid in the financial year (if any)	\$ _____	
General Work Related and Other Tax Information		
Details of salary and wage income – PAYG and ETP Payment Summaries which may include Reportable Employer Superannuation Contributions. <i>Please note if your employer has lodged using STP we will already have this electronically.</i>	☐ ☐	
Details of foreign employment income – Payment Summary.	☐ ☐	
Employee share scheme information – a statement from your employer detailing any employee share scheme shares or options acquired.	☐ ☐	
Government Allowance such as JobSeeker, Youth Allowance and Austudy.	☐ ☐	
Details of <u>tax-free</u> government pensions, and/or foreign/other pensions	☐ ☐	
Interest received on bank accounts and term deposits held during the year	☐ ☐	
Details of any other income you have received e.g. income protection benefits, etc.	☐ ☐	
Work-related deductions. Examples Include:	☐ ☐	
☐ Motor vehicle log book and details of expenses ☐ Work-related travel ☐ Uniforms ☐ Union dues ☐ Telephone and internet ☐ Stationery and reference materials ☐ Computer expenses ☐ Tools purchased (including cost of tools & description) ☐ Income protection insurance premiums ☐ Self-education expenses		
Home Office - _____ hours per week x _____ number of weeks	☐ ☐	
Donation Receipts	☐ ☐	
Private health fund – Do you have private health insurance hospital cover?	☐ ☐	
Total amount of child support you paid.	\$ _____	

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Other Information	Client Yes No	Office Use
Have you made a personal contribution to a Super Fund?	☐ ☐	
If yes, how much was your contribution?	\$ _____	
How much of this do you intend to use for the Super Co-contribution?	\$ _____	
How much of this do you intend to claim as a tax deduction?	\$ _____	
Please provide a copy of the written acknowledgement from your superannuation fund for the amount you wish to claim.	☐ ☐	
This <u>MUST</u> be provided before we can lodge your tax return. <i>If you are not sure, we recommend notifying your fund that you intend to claim all of the contribution as soon as possible. We can let you know if this should be varied when we complete your work. Please note however that if you roll to a new fund or commence a super pension that later amendments will not be possible.</i>		
Dependent Children full names, dates of birth, and if started/finished school.		

Are you registered with Centrelink to receive Family Tax Benefit?	☐ ☐	
Rental Investment Property	Client Yes No	
Rental Summary from Real Estate Agent, AirBNB, or gross rental income.	☐ ☐	
Insurance Recovery Income & details	☐ ☐	
Loan Statements for the year or calculated amount of interest you paid	☐ ☐	
Loan package fees if paid from another account	☐ ☐	
Copies of invoices for any purchases of new fittings or furnishings	☐ ☐	
A breakdown of rental expenses for the year	☐ ☐	
☐ Rates and water charges		
☐ Body corporate fees		
☐ Insurance		
☐ Repairs and maintenance		
☐ Cleaning and gardening expenses		
☐ New equipment purchased		
☐ Travel (<i>now only required for non-residential/commercial rentals</i>)		
Provide Details of any periods not genuinely available for rent (<i>especially for holiday homes, houses being constructed or renovated, or for any other reason</i>)		

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Newly acquired rental property

- Purchase contract and settlement statement
- Purchase costs – solicitors fees, stamp duty, transfer costs, etc.
- Quantity Surveyor's report
- Details of Borrowings (if jointly owned, details of ownership interest)

Client
Yes No

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Sale of rental property

- Sale contract and settlement statement
- Selling costs – solicitors fees, agents commission, advertising, etc
- Purchase contract and settlement statement if not previously supplied
- If the property was principal place of residence, dates the house was lived in.

Client
Yes No

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Office
Use

Investments – Shares, Managed Funds, Cryptocurrency, etc

- Investments – annual tax statements from Managed Funds.
(Please note these are usually not available until between August and September, so your tax return will not be able to be finalised until then if you have these types of investments.)
- Dividend statements (please also include the HIN/SRN)
(Also include this detail for dividends that have been reinvested)
- Loan statements and interest details
- New Shares Purchased – purchase documents showing purchase price and number of shares purchased
- Sale of Shares - sale documents showing number of shares sold and sale price, original purchase details including number of shares and purchase price
- Withdrawal/Sale of Managed Funds – sale documents and details of purchases if not previously supplied.

Client
Yes No

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Use