



# TAX RETURN CHECKLIST



# TAX RETURNS MADE EASY

ARE YOU READY TO GET THE MOST OUT OF YOUR 2025 TAX RETURN?  
OUR EXPERT TEAM IS HERE TO HELP YOU DO JUST THAT.

With years of experience in tax preparation and planning, we know exactly how to identify all the deductions and credits you're eligible for, so you can maximise your refund and keep more of your hard-earned money.

Don't leave money on the table; contact us today to learn more about our tax preparation services and start making the most of your return!

CONTACT US TODAY

[info@mpaccounting.net.au](mailto:info@mpaccounting.net.au)

[www.mpaccounting.net.au](http://www.mpaccounting.net.au)

# INDIVIDUAL TAX DEDUCTIONS & CONSIDERATIONS

## 1. Work-Related Deductions

*These expenses must be directly related to your clients' income-earning activities.*

### VEHICLE AND TRAVEL EXPENSES

Travel between different workplaces  
(e.g., client sites or office locations)

Using a car for work purposes (logbook  
or cents-per-kilometre method)

Parking fees and tolls while traveling for  
work

Public transport, taxi, or rideshare  
expenses for work-related travel  
(excluding commuting from home to  
work)

### CLOTHING AND LAUNDRY

#### Costs of buying, cleaning, and repairing:

Work-specific uniforms with a logo

Protective clothing (e.g., safety boots,  
gloves, or hi-vis gear)

Occupation-specific attire (e.g., chef's  
jackets, nursing scrubs)

### TOOLS AND EQUIPMENT

Purchase or repair costs of tools or  
equipment used at work

Depreciation on equipment over \$300  
(e.g., laptops, power tools)

### HOME OFFICE EXPENSES

#### Running Costs

Electricity and gas for heating, cooling,  
and lighting

Internet and phone bills (apportioned for  
work use)

Cleaning and maintenance of the home  
office

#### Office Supplies

Stationery, printer ink, and other  
consumables

#### Depreciation on Assets

Furniture (e.g., desks, chairs)

Equipment (e.g., computers, printers, or  
monitors)

#### Self-Education Expenses

Tuition fees and course costs for  
maintaining or improving skills related to  
their current job.

Reference books, technical manuals, or  
study guides.

Travel costs to attend training (e.g.,  
public transport or mileage if using their  
car).

Depreciation of study-related tools,  
equipment, or technology.

## 2. Investment-Related Deductions

*For individuals with income-generating assets like rental properties or shares:*

### INVESTMENT INCOME EXPENSES

Fees paid to financial advisors for income-producing investments

Costs for managing share portfolios (e.g., platform fees)

Interest on loans for purchasing investments like shares

Deductions for dividend imputation (franking credits)

## 3. Personal Super Contributions

Voluntary contributions made to their superannuation fund.

Ensure the contribution notice is lodged with their super fund and the acknowledgment is received before claiming.

## 4. Donations and Gifts

Gifts or donations to registered charities or deductible gift recipients (DGRs). Must have receipts for contributions over \$2.

## 5. Income Protection Insurance

Premiums for income protection insurance policies (must be outside of superannuation).

## 6. Tax Agent and Accounting Fees

Fees paid to accountants or tax agents for preparing and lodging tax returns.

Associated travel costs for meetings with accountants or tax agents.

## 7. Union and Professional Memberships

Union fees for industry-related memberships.

Professional association fees or subscriptions (e.g., CPA, AICD).



### 8. Other Eligible Deductions

Expenses incurred while earning foreign income.

Cost of managing tax affairs, such as travel expenses to attend appointments.

Ongoing expenses for income-producing activities (e.g., rental income or shareholding).

### KEY CONSIDERATIONS FOR INDIVIDUALS

#### Record Keeping

Encourage clients to keep detailed records and receipts for at least five years.

#### Apportionment

Some expenses may need to be split between personal and work-related use.

#### Eligibility

Ensure deductions are only claimed where they are directly related to assessable income.

#### Reimbursement

Clients cannot claim deductions for expenses that were reimbursed by their employer.

### NOTES

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