

Siganos Sydney Accountants

Chartered Accountants & Tax Agent Oatley Sydney NSW
admin@siganos.com.au

SOLE TRADER BUSINESS TAX RETURN CHECKLIST

TAX YEAR: ____ / ____

1. PERSONAL DETAILS

Full Legal Name	
Preferred Name / Trading Name	
Date of Birth Tax File Number (TFN)	
Residential Address	
Suburb State / Postcode	
Postal Address (if different)	
Phone (Mobile) Phone (Work/Home)	
Email Address	
Occupation / Business Type ABN (if applicable)	
Business Name (if registered)	

Spouse / Partner Details (if applicable)

Spouse Full Name
Spouse TFN

Spouse Date of Birth
Spouse: Private Health Cover? Yes/ No
Must have ambulance Cover

Spouse Taxable Income (\$)

Note: Spouse income is required to calculate Family Tax Benefit, Medicare Levy Surcharge & offsets.

Dependants

No. of Dependent Children Ages of Dependants

2. INCOME

Business / Sole Trader Income

Gross Business Income / Turnover Amount \$

Amount (\$)

Less: Business Expenses (attach schedule)

Amount (\$)

Net Business Profit / (Loss)

Amount (\$)

*Please provide required profit & loss statement, cash book summary if cash is held & a bank statements of income and expenses or email access to you accounting software.
If you are using accounting software to managed your income activity, we will require an invite to the file.*

Employment Income (if applicable)

Salary, Wages & Allowances — attach PAYG Payment Summary

Amount (\$)

Tips, Bonuses or Overtime

Amount (\$)

Allowances (car, travel, uniform, etc.)

Amount (\$)

Provide all Payment Summaries / Income Statements from MyGov.

Investment Income

Interest Income (bank accounts, term deposits Yes/ No

Amount (\$)

Dividends (attach dividend statements Yes/ No

Amount (\$)

Managed Fund / Trust Distributions Yes/ No

Amount (\$)

Rental Income — attach rental schedule Yes/ No

Amount (\$)

Capital Gains (asset sales — provide purchase & sale details Yes/ No

Amount (\$)

Foreign Income / Foreign Pensions Yes/ No

Amount (\$)

Crypto / Digital Asset Income Yes/ No

Amount (\$)

Other Income

Partnership / Trust Income — attach distribution statements Yes/ No

Amount (\$)

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Lump Sum / Back Pay Payments Yes/ No	Amount (\$)
Compensation / Insurance Payouts (taxable) Yes/ No	Amount (\$)
Cash Income (market stalls, odd jobs, etc.) Yes/ No	Amount (\$)
Other Income not listed above (describe) Yes/ No	Amount (\$)

3. GOVERNMENT PAYMENTS

Tick all payments received from Centrelink / Services Australia during the tax year. Provide Centrelink Income Statement or MyGov summary.

☐ JobSeeker Payment	☐ Youth Allowance
☐ Austudy / ABSTUDY	☐ Parenting Payment
☐ Disability Support Pension	☐ Age Pension
☐ Carer Payment / Carer Allowance	☐ Family Tax Benefit (Part A / B)
☐ Child Care Subsidy	☐ COVID-19 Disaster Payment
☐ Pandemic Leave Disaster Payment	☐ Other Centrelink Payment

Government Payment Amounts

☐ Total Taxable Government Payments Received (\$)	Amount (\$)
☐ Tax Withheld from Government Payments (\$)	Amount (\$)
<i>Note: Some government payments are tax-free; others are assessable income. Please provide your Centrelink Statement from myGov.</i>	

Commonwealth Seniors Health Card / DVA

☐ Department of Veterans' Affairs (DVA) Pension / Payment	Amount (\$)
☐ Commonwealth Seniors Health Card Benefits	Amount (\$)

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4. BANKING DETAILS (for ATO Tax Refund)

The ATO requires bank account details to deposit any tax refund. Please ensure details are current and match your account name exactly.

Account Name (as it appears on the account)	
Financial Institution / Bank	
BSB:	Account Number:
Branch / Address (optional)	

PAYG Instalments (if applicable)

☐ PAYG Instalments Paid to ATO during the year (\$)

Provide BAS / IAS records or ATO Income Tax Account statement confirming instalments paid if you are a new client only existing clients, we have this on file

5. BUSINESS DEDUCTIONS (Tick all that apply — provide receipts/invoices)

☐ Advertising & Marketing \$	☐ Bank Fees & Charges\$
☐ Business Insurance\$	☐ Business Travel & Accommodation\$
☐ Computer / IT Equipment\$	☐ Depreciation (asset schedule) \$
☐ Home Office Expenses\$	☐ Motor Vehicle Expenses\$
☐ Phone & Internet (business %)\$	☐ Professional Development\$
☐ Rent / Lease of Premises\$	☐ Repairs & Maintenance\$
☐ Subcontractors / Contractors\$	☐ Uniforms / Protective Clothing\$
☐ Stationery & Office Supplies\$	☐ Subscriptions & Memberships\$
☐ Superannuation Contributions\$	☐ Tools & Equipment\$
☐ Wages & Salaries Paid\$	☐ Work-Related Training\$
☐ Other (specify below) \$	

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Other Deductions — please describe

Motor Vehicle: Log Book? [] Yes [] No
Business km (estimate):

6. Residency, visa and tax residency

Australian resident for tax purposes for FY2026? Yes / No

Resident for full year? Yes / No

Did tax residency change during the year? Yes / No Date: _____

Visa holder? Yes / No Visa subclass/type: _____

Visa grant date: _____ Expiry date: _____

Temporary visa? Yes / No Working holiday maker? Yes / No

Country of citizenship: _____

Country of usual residence: _____

Arrived in / departed Australia during FY2026? Yes / No

Arrival date(s): _____ Departure date(s): _____

Days physically in Australia during FY2026: _____

Home maintained in Australia? Yes / No Overseas? Yes / No

Spouse / dependants living in Australia? Yes / No

Employment or business ties in Australia? Yes / No

Foreign income earned while tax resident? Yes / No

Temporary resident for tax purposes claimed? Yes / No

- ATO residency depends on tax residency tests, not Home Affairs status

7. CLIENT DECLARATION

I declare that the information provided in this checklist is true, correct and complete. I understand that it is an offence to knowingly make a false or misleading statement to the ATO. I authorise Siganos & Co Pty Ltd to prepare and lodge my income tax return on my behalf.

Client Signature

Print Name

Date

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Privacy Notice: Personal information collected on this form is used solely for the preparation of your income tax return and associated tax services. Information is handled in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles. We do not disclose your information to third parties except as required to fulfil our tax agent obligations or as required by law.

Notes/ Other Questions
