

EOFY Tax Checklist 2025 - For Investors

Before 30 June

- Review capital gains/losses – plan any asset sales
- Prepay investment loan interest (if eligible)
- Claim property-related deductions (maintenance, insurance)
- Top up super (non-concessional cap: \$120,000)
- Make deductible donations
- Check franking credit details for dividends

What to Prepare

- Dividend statements
- Buy/sell contracts for shares & crypto
- Crypto platform tax reports (e.g., CoinTracking, Koinly)
- Property rental statements
- Loan interest summaries
- Depreciation schedules
- CGT summary reports