



EL DORADO BUSINESS SERVICES P/L

www.ebs-tax.com.au

Mobile: 0400 353690

Self-Education Expenses Questionnaire

Type onto this form by [clicking the Comment Menu Icon](#) on the RHS, then using [the appropriate icon above](#) to complete.

CLIENT NAME:

CLIENT SIGNATURE:

PLEASE NOTE:

1. Before any claim can be made for self-education the substantiation provisions under Division 900 and 28 of the ITAA 1997 must be satisfied;
2. Claims for car expenses associated with the course of self-education may require the taxpayer to maintain a log book or similar travel diary;

TAXPAYER'S SELF-EDUCATION EXPENSES DECLARATION

- A. I confirm that I wish to make the above claim for self education expenses on the basis that I have incurred the expenses in deriving my assessable income and I have the necessary records to substantiate my claim;
- B. My tax agent has explained to me the law as it relates to claims for self education expenses; and
- C. I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.

SUBSTANTIATION QUESTIONNAIRE

Name of course:

Name of institution:

Explanation of course syllabus:

What is your current occupation:

Provide a brief explanation of your current employment activities/responsibilities:



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Circle the statement below that best describes the connection that the course of self education has with your current work activities:

- The course of self-education is directly related to my current employment activities;
- The course of self-education is likely to lead to increased income from employment; or
- Other reason.

Provide details of how the course of self education can be linked to your current income producing activities:

Will your employer support the need for the course of self education? Yes/No

If NO, explain why you still believe that you are entitled to claim the self education expenses:

If the course of self education is designed to obtain a promotion, please explain how your current position relates to the expected promotion:

SELF EDUCATION EXPENSES WORKSHEET

CATEGORY A EXPENSES – General expenses that are allowable as a deduction

\$



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Course or tuition fees (Not HECS, Financial Supplement Loan or Open Learning)			
Text Books			
Stationary and photocopying			
Journals and periodicals			
Car expenses (Complete our Motor Vehicle Expenses Schedule) <ul style="list-style-type: none"> • home to place of education and then to home • home to place of education and then to work • work to place of education and then to home work to place of education and then to work			
Cost of travel (i.e., bus, train, tram) in the following circumstances: <ul style="list-style-type: none"> • home to place of education and then to home • home to place of education and then to work • work to place of education and then to home • work to place of education and then to work 			
Airfares – where a taxpayer is away from home overnight and has established a new home			
Home office expenses (variable/running- excluding occupancy costs)			
Interest on borrowed funds – solely to fund self-education expenses (i.e., excluding HECS/HELP)			
Child care costs (including travel)			
Other – e.g. parking fees, interest on loan, hire of equipment etc			
CATEGORY B EXPENSES – Depreciation on equipment used for self education			
ITEM	DATE PURCHASED	COST	
		\$	
		\$	
		\$	
CATEGORY C EXPENSES – Repairs to equipment used for self education			
DESCRIPTION		COST	
		\$	
		\$	