



TAX EDGE
ADVISORS

Suite 3-4 / 99 Lightwood Road
Springvale VIC 3171
Phone: 9548 1589
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Home Office Questionnaire

Taxpayer's name _____
Tax file number _____
Year ended _____
Employer _____

1. Nature of your business/occupation:

2. What work activities are performed at home?

3. Would your employer (if you have one) support the need for you to maintain a home office?

YES/NO

If **no**, why do you believe a claim can still be made?

4. Under which method is the home office running expenses being claimed?

- ☐ Fixed rate (**70 cents per hour**) method;
- ☐ Actual cost method;

What records have been maintained in order to substantiate your claim?



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5. Do you understand the difference between occupancy and running expenses?

YES/NO

If a claim is being made for “occupancy expenses”, please describe why you believe your home is a “place of business”.

Taxpayer’s home office declaration

- A. *I confirm that I wish to make the above claim for home office expenses on the basis that I have incurred the above 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 home office 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.*

Signed

Dated



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Home Office Running Expenses:

These include the following:

- energy expenses (i.e. gas and electricity)
- internet expense
- mobile and home telephone expenses
- stationery and computer consumables

Method 1: Fixed rate

Number of Hours home office used x Rate Running expense claim

_____ Hours x 70c per hour = \$ _____

Total Claim = \$ _____

Records you need to keep when using the ATO's fixed-rate method:

- You will need to keep some receipts, bills or invoices of the running expenses you have incurred in order to verify your claim.
- You will also need to keep a **record** (e.g., a timesheet, diary or similar record) of the **number of hours** you worked from home during the year, basically as follows:

Signed

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Working-from-home diary

Date	Start time	End time	Private time	Total time worked	Description of work done



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Method 2: Actual cost method

Running costs

Gas	\$	
Electricity	\$	
Lighting	\$	
Heating	\$	
Other:	\$	
Business use percentage		x _____ %
Home office running expenses claim		\$ _____

Occupancy expense

Provide details of the total occupancy expenses

_____	\$	
_____	\$	
_____	\$	
Total occupancy expenditure	\$	
Floor area of home office (Expressed in square metres)	x	_____ m ²
	\$	
Total floor area	÷	_____ m ²
Occupancy expense		\$ _____
Running expenses	+	\$ _____
Total home office expenses		\$ _____

Signed

Dated

Liability limited by a scheme approved under
Professional Standards Legislation.

ABN: 40 051 623 664



Tax agent
59754004