



TAX EDGE
ADVISORS

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Self-education Expenses Questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Name of course _____

Institution attended _____

1. Please provide an explanation of the course syllabus:

2. What is your current occupation?

3. Please provide a brief explanation of your current employment activities/responsibilities:

4. Please tick 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 my employment; or
- ☐ Other reasons _____

5. Please provide details of how the course of self-education can be linked to your current income-producing activities:



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6. Will your employer support the need for the course of self-education?

YES/NO

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

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

Please note:

1. *Before any claim can be made for self-education the substantiation provisions under Division 900 and Division 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.*

Signed

Dated

Liability limited by a scheme approved under
Professional Standards Legislation.

ABN: 40 051 623 664



Tax agent
59754004