



TAX EDGE
ADVISORS

Suite 3-4 / 99 Lightwood Road
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Tools and Equipment Questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer _____

1. Please provide details of your occupation.

2. How are the tools described listed below used by you in deriving assessable income?

3. Would your employer support the need for the use of the tools?

YES/NO

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

4. How has the effective life been determined for the tools and equipment?

Description	Effective Life
_____	_____
_____	_____
_____	_____
_____	_____



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5. Were any of the tools used for business and private purposes?

YES/NO

If **yes**, then how have you adjusted your tax claim to take into account the private use?

6. Please list all tools and equipment that you have depreciated.

Description	Acquisition Date	Depreciation Claim
Total depreciation on tools and equipment		\$

7. Please provide details of all repairs to equipment.

Description	Date Incurred	Repairs Claim
Total repairs deduction		\$

8. List of tools purchased during the year that are outright deductible.

Description	Date Incurred	Depreciation Claim
Total outright deduction		\$



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9. **Less:** any reduction for private use of the above.

Description

Effective Life

Total claim for tools

\$

7+8+9+10

Taxpayer's tools and equipment declaration

- A. *I confirm that I wish to make the above claim for tools and equipment 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 tools and equipment; 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