

## 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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\*Other than for the acts or omissions of financial services licensees.

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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:

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

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**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*
3. *Taxpayers must reduce their claim for self-education expenses by the \$250 nominated within S.82A of the ITAA 1936 for a course of self-education.*

**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.....

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