



Self-Education Expenses Questionnaire

Taxpayer Name: _____

Tax File Number: _____ Name of course: _____

Financial year ended: _____ 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 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 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:

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 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