



Work-related Self-education Expenses

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| ☐ Course Fee's | ☐ Textbooks |
| ☐ Stationary | ☐ Student Union Fee's |
| ☐ Internet \$ and % | ☐ Home Office Hours |

(Please provide details of the education or course attended for each of the costs)

Other Work-related Expenses

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| ☐ If you worked from home at all between 1 July 2020 and 30 June 2022, provide an estimate of hours worked from home. | |
| ☐ Computer software | ☐ Conference / seminars |
| ☐ Laptop / iPad | ☐ Home office |
| ☐ Internet | ☐ Stationary |
| ☐ Phone | ☐ Subscriptions |
| ☐ Professional fees | ☐ Insurance |
| ☐ Tools & equipment | ☐ Equipment repairs |
| ☐ Safety equipment | ☐ Sunscreen |
| ☐ Safety equipment | ☐ Equipment repairs |
| ☐ Union fees | |

Interest & Dividend Deductions

- ☐ Interest on loans and other expenses for investments.

Gifts or Donations

- ☐ Donations to registered Charities over \$2. Note that raffle tickets and lotteries are not tax-deductible even if run by a charity.
- ☐ Contributions to school building funds

Cost of Managing Taxes & Insurances

- ☐ Tax Return Cost for last year (if not prepared by us).
- ☐ Ongoing Financial Planning fees (exclude initial costs).
- ☐ Income Protection insurance premiums.

Other Information

- ☐ **Private Health Insurance Statement** if lodging before mid-August.
- ☐ **Spouse Superannuation contributions made by you** if your spouse's income was less than \$40,000.
- ☐ **Location(s) and period(s) lived in a Remote Area** or served with Overseas Forces for Zone Offset.
- ☐ **The amounts of any Tax-free Government Pensions** received & any Child Support Payments made by you.
- ☐ **Copy of your Spouse's Return** (if not being prepared by us)
- ☐ **Copy of your Tax Return for the Previous Financial Year** (if not prepared by us)
- ☐ **Your Bank Account Details** (BSB, Acct No, Acct Name). Please note, the ATO no longer issue refund cheques.

Non-Deductible Items

- ☐ **Travel between Home and Work**
Although you may want to claim some travel expenses in your tax return, travel between home and work is considered a private expense by the ATO.
- ☐ **Expenses Reimbursed by your Employer**
you cannot claim a deduction if the cost was met or reimbursed by your employer.
- ☐ **Plain / Ordinary Clothing** You cannot claim a deduction for the cost of buying or cleaning plain clothing (e.g., black pants) worn at work, even if you only wear it to work and even if your employer tells you to wear it.
- ☐ **Education Expenses for a New Job** You cannot claim a deduction if your study is only related in a general way to your current job or is designed to help you get a new job.

