

WORK DEDUCTION CHECKLIST

Please answer where applicable otherwise leave blank

Tax Return FY	
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Motor vehicle Expenses

Are you required to travel to different work locations	
Are you required to travel for training	

Travel between home and work is not claimable unless you carry bulky tools and there is no storage provided at work. There are 2 methods for claiming motor vehicle expenses:

1. Log-book method if you travel more than 5,000 KMs in a FY

Do you keep a logbook? If yes, please advise logbook %	
a. Motor vehicle fuel	
b. Motor vehicle rego	
c. Motor vehicle insurance	
d. Motor vehicle repairs & maintenance	
e. Motor vehicle tolls	
f. Motor vehicle other	
g. Motor vehicle loan interest	
h. Motor vehicle depreciation	

2. Cents Per KM method if you travel less than 5,000 KMs in a FY

If you do not keep a logbook but you are required to use your personal MV for work, Cents per KM method can be used. Please provide total KMs travelled for work (This method does not require written evidence to show exactly how many kilometres you travelled. But the ATO may ask you to show how you worked out your business kilometres, for example diary records to show the pattern of travel)	
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Travel & Accommodation Expenses

Travel and accommodation expenses if you spend a night away for work and are not reimbursed by your employer (including taxi, public transport, parking, accommodation, flights, and meals)

Uniform/Clothing Expenses

Any protective clothing/compulsory uniform with a logo/occupation specific clothing

(Casual clothing e.g., business shirts and pants cannot be claimed even it is required by your work)

Laundry - \$1 a wash if washed separately or \$0.50 a wash if washed with other clothes. (Cannot be claimed for casual clothing)

Self-Education Expenses

Self-education expenses if your education maintains or improves your professional skills and you enrolled in the study/course after you started working in this field

(Payment through HECS/HELP cannot be claimed)

Self-education

(FEE-HELP loan and VET student loan can be claimed if you are a full fee-paying student at a university or higher education institution)

Home office expenses.

a. Actual cost method – please provide total internet, electricity & gas bill, office furniture expenses and the percentage that is work related; OR

b. Set rate method – please provide total hours worked from home (You need to keep a record e.g., timesheet, rosters or work diaries of the hours worked from home)

Other work-related expenses

Total Tools expense (If each tool is less than \$300)	
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Provide name of tool, date of purchase and amount (If any tool is over \$300)	
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If you use your personal mobile phone for work. Write the amount of the monthly bill and the work % (Based on work calls divided by average total calls in a day)	
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Union Fees/professional membership/licence fees	
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Training courses (e.g., CPR/first aid course required by work)	
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Printing and stationery expenses	
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Donations to deductible gift recipients only	
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Tax agent fees if we did not lodge your last year tax return	
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Income Protection Insurance (Cannot be claimed if paid through Superfund)	
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List any other expenses you think may be relevant to your work	

I declare that all the above questions are answered correctly and that I have the invoices/evidence/proof for all the expenses claimed in this tax return and I am able to provide any or all of these to the tax agent if requested by the ATO.

I also acknowledge that it is my responsibility to keep all invoices/evidence for 5 years after tax return lodgement.

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Client Name

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Client Signature

Date