### 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 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.
* Other (specify):

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 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.*

**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.*

*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**