

**Roy A McDonald Work Related Expenses**

Please provide evidence. *This section is for expenses relating to your employment only. Record keeping for work related expenses. You must be able to substantiate all your claims for deductions with written evidence if the total amount of deductions you are claiming is greater than $300. The records you keep must prove the total amount, not just the amount over $300.*  You must have spent the money and not been reimbursed. It must be directly related to earning your income and you must have a record to prove the expenses even if less than $300.

**Work related car expenses**

There are Two methods we can use to claim your work related car use:

* Cents per kilometre method (max 5,000kms) ( @ $0.68c)
* Log book method

Use might include:

* Visiting customers – existing and potential
* Attending meetings & training seminars
* Running errands on behalf of your employer
* Travelling between work sites

*Please complete the table below as fully & accurately as possible to ensure we claim the method that gets you the best result possible.*

|  |
| --- |
| Make and model of the Car  |
| Registration Number   | Registered Owner  |
| Date of Purchase  | Purchase Price  |
| Size of the engine cc  | Finance type: Lease / Hire Purchase  |
| Odometer reading at beginning financial year.  | Odometer reading at end of financial year  |   |
| No. of kilometres  travelled  | No. of kilometres travelled for work  |   |
| Business Use  Percentage  |   | %  |
| How much did you spen | d on:  |   |   |
|  Petrol  |   |  Registration  |   |
|  Insurance  |   |  RACV  |   |
|  Tyres  |   |  Services  |   |
|  Repairs  |   |  Lease/HP  |   |
| Other (please specify nature)  |   |   |
| Do you still hold all receipts / statements and proof of payments? Yes/No  |

**Other work-related travel expenses**

Did you travel away from home on behalf of your employer? If so, do you have:

Employee domestic travel with reasonable allowance ............................................................................ Yes/No/Unsure

If the claim is more than the reasonable allowance rebate, do you have receipts for your expenses? . Yes/No/Unsure

Overseas travel with reasonable allowance ............................................................................................. Yes/No/Unsure

- do you have receipts for accommodation expenses? ........................................................................... Yes/No/Unsure

Employee without a reasonable travel allowance .................................................................................... Yes/No/Unsure

Other work-related travel expenses, e.g., borrowed car (Please specify) .............................................. Yes/No/Unsure

 ..........................................................................................................................................................................................

**Work-related uniform and other clothing expenses**

You can claim a deduction for the cost of buying and cleaning occupation-specific clothing, protective clothing and unique, distinctive uniforms. To make a deduction you may need to have written evidence that you purchased the clothing and diary records or written evidence of your cleaning costs.If you received an allowance from your employer for clothing, uniforms, laundry or dry-cleaning, make sure you show the amount of the allowance on your tax return. You can claim for clothing that is specific to your occupation, is not everyday in nature and allows the public to easily recognise your occupation - such as the checked pants a chef wears.You can't claim the cost of purchasing or cleaning clothes you bought to wear for work that are not specific to your occupation, such examples as a bartender's black trousers and white shirt, a business person's suit or a swimming instructor's swimwear.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|   | **Amount Spent $**   |   | **Work %** |   | **Receipts?**   |
| Protective clothing  |   |   | Yes/No  |
| Occupation-specific clothing  |   |   | Yes/No  |
| Non-compulsory uniform  |   |   | Yes/No  |
| Compulsory uniform  |   |   | Yes/No  |
| Laundry (up to $150 without receipts)  |   |   | Yes/No  |
| Dry cleaning  |   |   | Yes/No  |
| Other claims – mending/repairs, etc (please specify)  |   |   | Yes/No  |
|   | Please describe uniform for us: *(NB: Normal business clothing, such as suits, is not allowed.* |   |
| *Sorry!)* |   |
|   |

**Work-related self-education expenses**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Course taken at educational institution**   | **Amount Spent $**   |   | **Work %** |   | **Receipts?**   |
| Name of course undertaken  |   |
| Student union fees  |   |   |   | Yes/No  |
| course fees  |   |   |   | Yes/No  |
| Travel  |   |   |   | Yes/No  |
| text books  |   |   |   | Yes/No  |
| Stationery  |   |   |   | Yes/No  |
| other (please specify)  |   |   |   | Yes/No  |
| Does the course relate to your existing work?  |   | Yes/No  |
| Does your employer encourage/support you in this course?  |   | Yes/No  |
| How many hours per week (on average) did you study at home?  |   |

**Other work-related expenses** *(Remember these are expenses to do with your employment only)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|   | **Amount Spent $**   |   | **Work %** |   | **Receipts?**   |
| Home office expenses  |   |   |   | Yes/No  |
| How many hours pw on average do you spend working at home?  |   |   |   | Yes/No  |
| Computer and software  |   |   |   | Yes/No  |
| Internet  |   |   |   | Yes/No  |
| Telephone/mobile phone  |   |   |   | Yes/No  |
| Tools and equipment < $300 each item  |   |   |   | Yes/No  |
| Subscriptions /Union fees /Professional Associations  |   |   |   | Yes/No  |
| Journals/periodicals  |   |   |   | Yes/No  |
| Briefcase/calculators etc.  |   |   |   | Yes/No  |
| Depreciation – Assets costing > $300 each item date bought and cost  |   |   |   | Yes/No  |
|  |   |   |   |  |
| Seminars and courses not at an educational institution (ie. not shown above at D4)  |   |
|  Course fees  |   |   |   | Yes/No  |
|  travel  |   |   |   | Yes/No  |
|  other (please specify)  |   |   |   | Yes/No  |
| Expenses in relation to allowances  |   |   |   | Yes/No  |
| Any other work deductions (please specify)  |   |   |   | Yes/No  |
|   |   |   |   |   |
|   |   |   |   |   |