

Self Education Worksheet

Client Name

Surname

Given Names

Have you undertaken any work-related Self-Education*?

Name of course or study:

How does this relate to earning income?

Expenses:

Course Fees: (cannot include HECS amounts)

\$

General Service/Union Fees

\$

Stationery/Parking

\$

Books/Journals

\$

Extra Tuition

\$

Telephone/Internet costs

\$

Travel

kms

Other: (Please specify)

\$

* Note: Self-Education must be relevant to your current employment, and not to open up a new source of income.

SUBSTANTIATION

The substantiation guidelines require you to keep receipts, log books and other documentary evidence to establish that you have spent the amounts you claim.

A valid receipt has the name and ABN of the supplier, the date paid, the amount in Australian dollars and a full description of the product.

You should keep all receipts for at least 5 years after lodging your tax return. You do not need to send them in, but they need to be available if required.