

Work-related & other deductions checklist

1 Work related expenses

- ☐ **Car expenses**
Please confirm the number of kilometres travelled, or the work-use percentage per your logbook along with the running costs. This excludes travel between home and your regular place of work. A logbook must cover a representative 12 week period and be less than 5 years old.
- ☐ **Self education**
Cost of courses, conferences or seminars where there is a sufficient connection to earning income from your current employment activities because it maintains or improves the specific skills required for your current job; or it is likely to result in an increase in your income from your current job.
- ☐ **Travel (exc Car)**
Parking fees, tolls, airfares, train/bus/taxi fares, accommodation and meals while travelling interstate and overnight. Not claimable if reimbursed by employer.
- ☐ **Clothing**
Purchases of protective clothing, occupation-specific clothing, or a uniform with your employer's logo can be deductible. Please advise any dry cleaning costs and/or the number of laundry washes per week.
- ☐ **Other work related expenses**
Union fees, membership registrations and subscriptions, professional library, tools & equipment, accreditations, licences & WWVP checks, stationery etc.

2 Home office expenses

- ☐ **Number of hours worked from home during the year**
The ATO requires full diary records showing hours per day for the whole financial year.
- ☐ **Assets purchased, if any**
For example a laptop or mobile. We will need the date of purchase, the cost, and the work-use percentage.
- ☐ **Mobile and internet**
We will need the total bills and the work-use percentage, and will calculate whether the hourly rate or the actual work-use method gives you the better deduction. The ATO requires records of how the work-use percentage was calculated.
- ☐ **Stationery and computer consumables**

3 Other expenses

- ☐ **Donations to charities and school building or library funds**
The recipient needs to be a registered deductible gift recipient.
- ☐ **Tax agent fee from last year (if not paid to DFK Everalls)**
- ☐ **Personal super contribution claimed as a deduction, if any**
We will need a copy of the super fund acknowledgement letter for our records.
- ☐ **Income protection insurance paid personally not through super fund**

TWO THINGS TO NOTE

- 1 If you are a new client, please also provide a copy of your prior year's tax return so we can continue claiming depreciation on existing assets.
- 2 If you have other work-related deductions not listed here, please let us know.