



# Sangelictax

## Sangelictax

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“ Service with a Sangelic Touch ”

### Other work related expenses questionnaires

#### Home office questionnaire

Taxpayer's name \_\_\_\_\_

Tax file number \_\_\_\_\_

Year ended \_\_\_\_\_

Address of property \_\_\_\_\_

1. Nature of your business/occupation:

\_\_\_\_\_  
\_\_\_\_\_

2. What work activities are performed at home?

\_\_\_\_\_  
\_\_\_\_\_

3. Would your employer (if you have one) support the need for you to maintain a home office?

**YES/NO**

If **no**, why do you believe a claim can still be made?

\_\_\_\_\_  
\_\_\_\_\_

4. Under which method is the home office running expenses being claimed?

- ATO formula method;
- reasonable estimate method;
- standard 26 cents per hour method.

What records have been maintained in order to substantiate your claim?

\_\_\_\_\_

**The contents of this worksheet are confidential to the person it is addressed to please contact sender in the event it is not received by the intended person.**



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- \_\_\_\_\_
- \_\_\_\_\_
5. Do you understand the difference between occupancy and running expenses? **YES/NO**  
If a claim is being made for “occupancy expenses”, please describe why you believe your home is a “place of business”.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. If you are claiming your “variable” home office expenses at 26 cents an hour, have you kept a diary of the number of hours you used your home office? **YES/NO**  
If **no**, then no claim can be made under this method.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Taxpayer’s home office declaration

- A. *I confirm that I wish to make the above claim for home office expenses on the basis that I have incurred the above 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 home office expenses; and*
- 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 .....

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