



# Sangelictax

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“ Service with a Sangelic Touch ”

### Overseas and domestic travel questionnaires

#### Domestic and overseas travel questionnaire

Taxpayer's name \_\_\_\_\_  
Tax file number \_\_\_\_\_  
Year ended \_\_\_\_\_  
Employer \_\_\_\_\_

1. Why did your employment duties demand the need for business travel?

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

2. Will your employer support the need for the overnight business travel? **YES/NO**

If **no**, please explain why you believe that you are still entitled to claim your travel expenses:

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

3. Please specify the destination of the business travel and the dates on which the travel was undertaken:

	<b>Destination</b>		<b>Travel dates</b>
1.	_____	_____	to _____
2.	_____	_____	to _____
3.	_____	_____	to _____
4.	_____	_____	to _____

4. Please provide details of the nature of the above mentioned business travel:

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

**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. Substantiating domestic business travel:

Did the following conditions apply to you during your domestic overnight business travel:

- you received a bona fide travel allowance for overnight business travel; and
- your travel claim is in accordance with the reasonable limits specified in TD 2008/18?

YES/NO

If **yes**, then you can claim your overnight business travel expenses without the need to provide documentary evidence. Please note that you must have actually incurred the expense to be able to claim a tax deduction.

If **no**, then full substantiation will apply to your claim for overnight business travel.

6. If you are required to substantiate your domestic overnight travel claim, then what records did you maintain to substantiate your travel claim?

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**Substantiating overseas business travel**

7. Did the following conditions apply to you during your overseas overnight business travel:

- you received a travel allowance for overnight business travel;
- the overseas business travel was for less than six nights; and
- your travel claim is in accordance with the reasonable limits specified in TD 2008/18?

YES/NO

If **yes**, then you can claim your overnight business travel expenses without the need to provide documentary evidence for your meals and incidental expenses. Written evidence of accommodation expenses is always required.

If **no**, then full substantiation will apply to your claim for overnight business travel.

In addition, a travel diary will be required where the overseas travel was for more than five nights.

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8. If you are required to substantiate your overseas overnight travel claim, then what records did you maintain to substantiate your travel claim?

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*Please note:*

1. *That before any claim can be made under the per diem rates that are contained under TD 2007/21 you must have actually incurred the relevant expense.*
2. *Taxpayers undertaking overseas travel must keep written evidence with respect to accommodation, regardless of whether they receive a travel allowance and their claim is within the reasonable limits under TD 2008/18.*

### **Taxpayer’s domestic and overseas travel questionnaire declaration**

- A. *I confirm that I wish to make the above claim for domestic or overseas travel on the basis that I have incurred the above expenses in deriving my assessable income and I have the necessary written evidence and also travel records (where required) to substantiate my claim;*
- B. *My tax agent has explained to me the law as it relates to claims for local and overseas travel 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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