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FOOTHILLS TAXATION SERVICES
PTY LTD

Trustee for the Foothills Family Trust
ABN 83 163 325 525

Truck drivers' questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer (if applicable) _____

1. Were you required to sleep away from home overnight during the income year as part of your work duties? **YES/NO**

If **no**, then no claim can be made.

2. If **yes** to question one, how many nights did you sleep away from home? _____

3. What records do you have, such as a travel diary, to confirm the number of nights you slept away from home during the income year?

*Note, where no records exist and you are not an employee in receipt of the Commissioner's reasonable truck driver's allowance noted in **TD 2019/11**, no claim should be made.*

4. Were you paid a reasonable travel allowance in accordance with the Commissioner's guidelines? **YES/NO**

5. If you answered **yes** to question four, you must be able to demonstrate the following:

Expenses claimed must have been incurred;

- Expenses must be directly relevant to earning your income while you are away from home overnight;
- If the claim is no more than the Commissioner's reasonable amount, no substantiation is required; or
- If the claim is more than the Commissioner's reasonable amount, the whole amount must be supported by written evidence.

Note 1: *If you did not receive a travel allowance, or are a sole trader or self-employed, the following guidelines apply:*

- All expenses claimed must have been incurred; and
- The expenses claimed must be either incurred in gaining or producing your assessable income or necessarily incurred in carrying on your business; and
- The whole claim must be supported by written evidence and travel records, where required.

Note 2: You should be aware that written evidence from a supplier must show the following details:

- The date the expense was incurred;
- The name or business name of the supplier;
- The amount of the expense incurred;
- The nature of the goods or services; and
- The date the document was made out.

If the document provided by the supplier does not specify the nature of the goods or services, you may insert the missing details on the document before lodging the tax return.

6. Have you incurred truck driving expenses for parking fees, road or bridge tolls, etc. that will either require receipts or a completed diary recording the written evidence details from note 2 above? **YES/NO**

If **yes**, please provide the following information:

Details

Truck driver’s declaration

- A. I confirm that I wish to make the above claims for truck drivers’ 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 claims;
- B. My tax agent has explained to me the law as it relates to truck drivers including the Commissioner’s ruling guidelines; 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