

Client Expenses Declaration Form

Registered Tax Agent

Work-related & business expense declaration for tax purposes

Please list all expenses you wish to claim for the relevant financial year. Amounts should exclude any portion reimbursed by an employer. Keep all receipts and records for at least five years – the ATO may request them at any time.

1. Client & Income Year Details

Full Name / Entity Name

Income Year (e.g. 2025–26)

Occupation / Business Activity

Employer / Business Name

2. Motor Vehicle Expenses

Include fuel, registration, insurance, servicing, interest and depreciation. Note your claim method below.

Cents per km

Logbook (attach logbook % / km)

Description	Amount (\$)
Subtotal (auto)	

3. Travel Expenses (airfares, accommodation, meals – work related)

Description	Amount (\$)
Subtotal (auto)	

4. Uniform, Protective Clothing & Laundry

Description	Amount (\$)
Subtotal (auto)	

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5. Self-Education & Professional Development

Description	Amount (\$)
Subtotal (auto)	

6. Home Office Expenses

Hours Worked From Home (per week)

Weeks Worked From Home (per year)

Claim Method (Fixed Rate / Actual Cost)

Description	Amount (\$)
Subtotal (auto)	

7. Tools, Equipment & Technology (over \$300 may need depreciation)

Description	Amount (\$)
Subtotal (auto)	

8. Memberships, Subscriptions & Union Fees

Description	Amount (\$)
Subtotal (auto)	

9. Donations & Gifts (to Deductible Gift Recipients)

Description	Amount (\$)
Subtotal (auto)	

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10. Income Protection Insurance & Tax Agent Fees

Description	Amount (\$)
Subtotal (auto)	

11. Other Work-Related / Business Expenses

Description	Amount (\$)
Subtotal (auto)	

TOTAL EXPENSES CLAIMED (\$) (auto)

12. Client Declaration

I/we declare that the expenses listed in this form were incurred by me/us personally, were directly related to earning my/our assessable income, and have not been and will not be reimbursed by an employer or any other party. I/we confirm that I/we hold valid receipts, invoices or other written evidence for each expense claimed, and will retain these records for a minimum of five years as required by the Australian Taxation Office, and will provide them to Creative Accounting Services Pty Ltd upon request. I/we understand that Creative Accounting Services Pty Ltd will rely on the information provided in this form to prepare my/our tax return, and that I/we remain responsible for the accuracy and completeness of the amounts declared. I/we acknowledge and agree that liability for Creative Accounting Services Pty Ltd's professional fees commences as soon as work on this engagement begins, and that fees are payable prior to lodgement regardless of the outcome of the engagement.

I/we declare that the above information is true and correct to the best of my/our knowledge.

Full Name of Signatory

Position / Capacity

Signature

Date

This form and any supporting documentation will be retained securely by Creative Accounting Services Pty Ltd in accordance with its Privacy Policy and statutory record-keeping obligations.