

EDUCATION TAX REFUND

CHECKLIST

1. What is the Education Tax Refund?

You can claim the Education Tax Refund (ETR) for education expenses you incur while your child attends primary or secondary school.

Families can claim 50% of their eligible educational expenses if:

- They received Family Tax Benefit (FTB) Part A for the child, or
- A payment was made for the child that stopped them from receiving FTB Part A for that child (for example, Youth Allowance)

Independent students may also be eligible to claim the ETR.

The maximum you can claim is 50% of eligible expenses up to:

- \$780 for each eligible child in primary school – that is, a maximum refund of up to \$390
- \$1,558 for each eligible child in secondary school – that is, a maximum refund of up to \$779

If your expenses exceed your refund limit for the year, any excess can go towards your following year's refund claim, as long as you are still eligible.

2. Am I eligible?

You are eligible to claim an ETR for the period 1 July 2009 to 30 June 2010 if:

- You had eligible education expenses for a child, **and**
- The child was in primary or secondary school, **and**
- You received FTB Part A for the child, **or**
- A payment was made for the child that stopped them from receiving FTB Part A for that child, **or**
- Your child stopped full-time school during the year and received sufficient income to stop you receiving FTB Part A.

If you are an independent student attending secondary school or a secondary course of education provided at an educational institution such as a TAFE, you may also be eligible. There are specific additional criteria you must meet in order to be eligible, so if you believe you may be, please contact our office to discuss.

If you meet the eligibility criteria above for the Education Tax Refund please complete the information in the worksheet overleaf to allow us to calculate your claim for your 2010 Income Tax Return.

	<u>Child 1</u>	<u>Child 2</u>	<u>Child 3</u>	<u>Child 4</u>
NAME	_____	_____	_____	_____
PRIMARY SCHOOL <i>(Tick if attended)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Commenced*:	_____	_____	_____	_____
Date Ceased*:	_____	_____	_____	_____
SECONDARY SCHOOL <i>(Tick if attended)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Commenced*:	_____	_____	_____	_____
Date Ceased*:	_____	_____	_____	_____

* If during the period 1 July 2009 – 30 June 2010

ELIGIBLE EXPENDITURE FOR PERIOD 1 JULY 2009 – 30 JUNE 2010

Laptops and Home computers	\$ _____	\$ _____	\$ _____	\$ _____
Computer related Equipment and Repairs (eg printers / USB)	\$ _____	\$ _____	\$ _____	\$ _____
Home internet connections	\$ _____	\$ _____	\$ _____	\$ _____
Computer Software for Educational use	\$ _____	\$ _____	\$ _____	\$ _____
Stationery / Textbooks / other learning materials	\$ _____	\$ _____	\$ _____	\$ _____
Prescribed tools of trade for secondary trade courses	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL:	\$ _____	\$ _____	\$ _____	\$ _____

Please include the full cost of each item. There is no requirement to reduce the amount for private usage.