



Application for endorsement as a tax concession charity or income tax exempt fund



Complete this application if your organisation wants to apply for endorsement to access one or more of the following concessions:

- income tax exemption
- GST charity concessions
- fringe benefits tax (FBT) rebate
- FBT exemption

This application should be completed by a person authorised by the organisation to act on its behalf.

➤ An organisation seeking endorsement as a deductible gift recipient should apply on an *Application for endorsement as a deductible gift recipient* (NAT 2948).

If the pre-printed address is incorrect or not supplied, please print your organisation's correct address in the box above.

To complete this application:

- Use BLOCK LETTERS and print one character per box.
- Place in ALL applicable boxes.
- Print clearly, using a black pen only.

- All questions **must** be answered unless advised otherwise.
- Read the accompanying – *Instructions for endorsement as a tax concession charity or income tax exempt fund* (NAT 10652).

Section A: Applicant information

1 Your organisation's Australian business number (ABN) is:

If the pre-printed ABN is incorrect or not supplied, please print your organisation's correct ABN here.

2 Your organisation's legal name is:

If the pre-printed name is incorrect or not supplied, please print your organisation's correct legal name here.

3 What entity type best describes your organisation? Place in ONE box only.

➤ See instructions page 3

- charitable fund public benevolent institution income tax exempt fund
- charitable institution health promotion charity

4 Is your organisation a hospital? Yes No

❗ If 'YES', your organisation does not need to be endorsed to receive the FBT exemption up to the \$17,000 cap per employee.

5 What is your organisation's main purpose? Place in ONE box only.

➤ See instructions page 5

- advancement of health advancement of culture
- advancement of education advancement of the natural environment
- advancement of social and community welfare other purposes beneficial to the community
- advancement of religion

If you selected 'other', describe your organisation's main purpose.

6 What are the areas of your organisation's main activities? Place in ALL applicable boxes.

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> representative or peak body for other charities | <input type="checkbox"/> public works and utilities | <input type="checkbox"/> Indigenous | <input type="checkbox"/> culture |
| <input type="checkbox"/> education | <input type="checkbox"/> locality or neighbourhood | <input type="checkbox"/> unemployment | <input type="checkbox"/> environment |
| <input type="checkbox"/> religion | <input type="checkbox"/> aged persons | <input type="checkbox"/> defence and public order | <input type="checkbox"/> animals |
| <input type="checkbox"/> poverty | <input type="checkbox"/> youth | <input type="checkbox"/> industry, commerce, agriculture | <input type="checkbox"/> moral improvement |
| <input type="checkbox"/> disaster relief | <input type="checkbox"/> child care | <input type="checkbox"/> science | <input type="checkbox"/> other |
| <input type="checkbox"/> people with disabilities | <input type="checkbox"/> health | <input type="checkbox"/> research | |

If you selected 'other', describe your organisation's main charitable activities.

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7 Governing documents:

- (a) Does your organisation have written governing documents? Yes go to part (b) No See instructions page 5
- (b) Do those documents contain a suitable non-profit and winding up clause? Yes go to question 8 No See instructions page 6

8 In what year was your organisation established?

9 To what extent does your organisation pursue its purposes OUTSIDE Australia? %

10 What percentage of your organisation's expenses are devoted to pursuing its purposes OUTSIDE Australia? %

Section B: Endorsement information

See instructions page 7

11 Is your organisation applying for:

- (a) endorsement of your organisation as a whole go to question 12
or
- (b) endorsement for an FBT exempt public benevolent institution employer that your organisation operates (up to a \$30,000 cap per employee) provide details below
Please note this does not apply to hospitals that your organisation operates.

The name of the public benevolent institution employer your organisation operates.

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The address of the public benevolent institution employer your organisation operates (if different from your organisation's address)

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Suburb or town State/territory Postcode

Country if outside Australia

From what date would your organisation like to be endorsed? / / this date cannot be earlier than 1 July 2005 Go to question 13

If your organisation is seeking endorsement for more than one public benevolent institution employer that it operates, you will need to lodge a separate endorsement application for each one.

12 What tax concessions is your organisation applying to be endorsed for and from what date?

➤ See instructions page 8

Tax concession	Date of endorsement Day / Month / Year	Earliest possible date	Eligible entity type/s
(a) <input type="checkbox"/> all available tax concessions	<input type="text"/> / <input type="text"/> / <input type="text"/>	01/07/2005	CF, CI, PBI, HPC, ITEF
or			
(b) one or more of the following:			
<input type="checkbox"/> income tax exemption	<input type="text"/> / <input type="text"/> / <input type="text"/>	01/07/2000 01/07/2005	CF, CI, PBI, HPC ITEF
<input type="checkbox"/> GST charity concessions	<input type="text"/> / <input type="text"/> / <input type="text"/>	01/07/2005	CF, CI, PBI, HPC
<input type="checkbox"/> FBT rebate up to a \$30,000 cap per employee	<input type="text"/> / <input type="text"/> / <input type="text"/>	01/07/2005	CI
<input type="checkbox"/> FBT exemption up to a \$30,000 cap per employee	<input type="text"/> / <input type="text"/> / <input type="text"/>	01/07/2005	PBI, HPC (other than a hospital)

CF – charitable fund CI – charitable institution PBI – public benevolent institution HPC – health promotion charity ITEF – income tax exempt fund

Section C: Financial information

➤ See instructions page 17

❶ Questions 13 to 20 are compulsory for ALL applicants.

➤ If your organisation is applying for endorsement for a public benevolent institution (PBI) employer that it operates, answer the questions in relation to that PBI employer, not your organisation.

13 Are your organisation's financial statements audited by an independent auditor each year? Yes No

14 What is the most recent year for which your organisation has financial statements? Year

➤ If the year your organisation was established is the current year, please put the current year.

15 For that year provide the following information (all fields must be entered. If there is a nil amount insert 0 in that field)

➤ If the year your organisation was established is the current year, please provide an estimate.

end of year book value of net assets \$, , .~~X~~

RECEIPTS

donations \$, , .~~X~~

other fundraising activities \$, , .~~X~~

membership subscriptions \$, , .~~X~~

government grants and payments \$, , .~~X~~

business/program activities \$, , .~~X~~

other income \$, , .~~X~~

sale of capital assets \$, , .~~X~~

TOTAL RECEIPTS \$, , .~~X~~

OUTGOINGS

distributions to deductible gift recipients, charities and other non-profit organisations \$, , .~~X~~

business/program activities \$, , .~~X~~

employee expenses \$, , .~~X~~

other operating expenses \$, , .~~X~~

purchase of capital assets \$, , .~~X~~

TOTAL OUTGOINGS \$, , .~~X~~

- 16 Does your organisation own shares in a company that is not listed on a stock exchange? Yes No
- 17 Does your organisation provide property of any kind for the use of associated persons? Yes No
- 18 Does your organisation make loans? Yes No
- 19 Has your organisation purchased property of any kind (including money) from associated persons? Yes No
- 20 Has your organisation sold property of any kind (including money) to associated persons? Yes No

Section D: Declaration

Before you sign this form

Please check that you have provided accurate and complete information.

Penalties

Please be aware that penalties may be imposed for giving false or misleading information.

Privacy

The information requested in this application is required for your organisation's endorsement as a tax concession charity under the *Income Tax Assessment Act 1997*, *Fringe Benefits Tax Assessment Act 1986*, *A New Tax System (Goods and Services Tax) Act 1999* and the *Taxation Administration Act 1953*.

I am authorised to make this declaration on behalf of the organisation. The information contained within this application is accurate and complete.

Name of signatory

Position held

Business hours phone number (8.30am to 5.30pm weekdays)

Mobile phone number

Signature

Date / /

Day Month Year

Time taken to complete this form

Please provide the time taken (in minutes) to complete this application. minutes

How to lodge your application

Send your completed application to:

Australian Taxation Office
PO Box 3373
ALBURY NSW 2640