



1 July 2004 to 30 June 2005

Use Retirees TaxPack 2005 to fill in this tax return. Please print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box. Print X in appropriate boxes. Complete your details carefully to avoid delays in processing your tax return.

Your tax file number (TFN)

Grid for TFN

See the Privacy note in the Taxpayer's declaration on the last page of your tax return.

Your sex

Male Female

Your name

Print your full name.

Title - for example, Mr, Mrs, Ms, Miss

Grid for title

Surname or family name

Grid for surname

Given names

Grid for given names

Has any part of your name changed since completing your last tax return?

NO YES

Previous surname

Grid for previous surname

Your postal address

Print the address where you want your mail sent.

Grid for address

Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO YES

Suburb or town

Grid for suburb

State

Grid for state

Postcode

Grid for postcode

Country if not Australia

Grid for country

Is your home address different from your postal address?

NO Read on.

YES Print your home address.

Suburb or town

Grid for suburb

State

Grid for state

Postcode

Grid for postcode

Country if not Australia

Grid for country

Your date of birth

Please provide your date of birth to avoid delays in the processing of your tax return.

DAY MONTH YEAR grid

Your daytime telephone number - If we need to ask you about your tax return, it is quicker by telephone.

Area code

Telephone number

Grid for telephone number

Your spouse's name

If you had more than one spouse during 2004-05 print the name of your latest spouse.

Surname or family name

Grid for surname

Given names

Grid for given names

Will you need to lodge an Australian tax return in the future?

YES DON'T KNOW NO FINAL TAX RETURN

Do you want your refund paid directly into your financial institution account?

Read pages 14-15 in Retirees TaxPack 2005 for more information.

NO Read on.

YES If you had your refund paid directly into your account last year and you want us to use the same account, do not write the details again. Otherwise, fill in the BSB number, account number and account name details below.

BSB number Must be six digits

Grid for BSB number

Account number

Grid for account number

Account name - for example, JQ Citizen. Do not show the account type, such as cheque, savings, mortgage offset.

Grid for account name

<p>1 Australian Government pensions and allowances You must complete item 20 or 21 in Tax offsets.</p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	Income – do not show cents B <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00
<p>2 Other Australian pensions or annuities – including superannuation pensions Type <input style="width:300px;" type="text"/></p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	J <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00
<p>3 Foreign source pension or annuity income</p> <p>Assessable foreign source income E <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00</p>	Net foreign pension or annuity income WITHOUT an undeducted purchase price L <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 Net foreign pension or annuity income WITH an undeducted purchase price D <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	P <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 <small>CODE BOX</small>
<p>4 Salary, wages, allowances, earnings etc</p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	C <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00
<p>5 TOTAL TAX WITHHELD</p>	\$ <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 ←	Add up all the amounts in the tax withheld column – items 1, 2 and 4.
<p>6 Total reportable fringe benefits amounts</p>	W <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p>7 Gross interest Tax file number amounts withheld from gross interest M <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .<input type="text"/> <input type="text"/></p>	Gross interest L <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p>8 Dividends Tax file number amounts withheld from dividends V <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .<input type="text"/> <input type="text"/></p>	Unfranked amount S <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 Franked amount T <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 Franking credit U <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p>9 Capital gains Did you have a capital gains tax event during the year? G NO <input type="checkbox"/> YES <input type="checkbox"/> If you received a distribution of a capital gain from a trust, you cannot complete this tax return – use the tax return (supplementary section). Net capital gain A <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 Total current year capital gains H <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 Net capital losses carried forward to later income years V <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00</p>		
<p>10 TOTAL INCOME</p>	Add up all the income amounts in the right hand column – items 1 to 9. \$ <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	

Make sure that you complete item 27. See pages 73–7 in *Retirees TaxPack 2005*.



Please attach your Centrelink or Department of Veterans' Affairs payment summary, statement or letter, 'Payee's Tax Return Copy' of requested payment summaries and other attachments here.

Place your payment summaries on top followed by any other attachments. Do not send in your tax return until you have attached all requested attachments.

DEDUCTIONS Pages 36–50 in *Retirees TaxPack 2005* will help you to claim all your deductions correctly.

		Deductions – do not show cents	
11	Subscriptions	E	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
12	Interest and dividend deductions	I	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
13	Gifts or donations	J	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
14	Deductible amount of undeducted purchase price of an Australian pension or annuity	L	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
15	Deductible amount of undeducted purchase price of a foreign pension or annuity	Y	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
16	Cost of managing tax affairs	M	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
17	TOTAL DEDUCTIONS	Add up all the deduction amounts at items 11 to 16 \$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	
18	TAXABLE INCOME	Subtract the amount at item 17 from the amount at item 10 \$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	

TAX OFFSETS Pages 51–67 in *Retirees TaxPack 2005* will help you to claim your tax offsets correctly.

19	Spouse – married or de facto	To claim the spouse tax offset you must also complete Spouse details – married or de facto on page 5 of your tax return.	Tax offsets – do not show cents P <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
20	Senior Australians (includes age pensioners, service pensioners and self-funded retirees)	The Tax Office will work out this tax offset amount. Print your code letter in the TAX OFFSET CODE box. Read pages 55–6 in <i>Retirees TaxPack 2005</i> .	TAX OFFSET CODE N <input type="text"/> VETERAN CODE Y <input type="text"/>
21	Pensioner	– If you completed question 20 Senior Australians above DO NOT complete this question. The Tax Office will work out this tax offset amount. Print your code letter in the TAX OFFSET CODE box. Read pages 57–8 in <i>Retirees TaxPack 2005</i> .	TAX OFFSET CODE O <input type="text"/> VETERAN CODE T <input type="text"/>
22	Superannuation annuity and pension		S <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
23	Private health insurance	Amount of refundable tax offset not previously claimed by way of reduced private health insurance premiums You must complete Private health insurance policy details on page 4.	G <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
24	20% tax offset on net medical expenses over the threshold amount		X <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
25	TOTAL TAX OFFSETS	Add up all the tax offset amounts at items 19, 22, 23 and 24. \$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	

The Tax Office will work out any low income tax offset and mature age worker tax offset. Read page 67 in *Retirees TaxPack 2005* for more information.

You must provide the details for each policy if item **23** or **27** asked you to complete this section.

Health fund ID

B

B

B

Membership number

C

C

C

Type of cover

MEDICARE LEVY RELATED ITEMS

Pages 69–77 in *Retirees TaxPack 2005* will help you to fill in these items correctly.

26 Medicare levy reduction or exemption

! NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read question **26** in *Retirees TaxPack 2005* to work out if you are eligible to claim.

Exemption categories

Full 1.5% levy exemption – number of days **V**

Half 1.5% levy exemption – number of days **W**

If you have completed item **26** and had a spouse during 2004–05 you must also complete **Spouse details – married or de facto** on page 5 of your tax return.

27 Medicare levy surcharge

THIS ITEM IS COMPULSORY FOR ALL TAXPAYERS.

If you do not complete this item you may be charged the full Medicare levy surcharge (MLS).

To help you determine if you have to pay the surcharge read pages 73–7 in *Retirees TaxPack 2005*.

For the **whole** period 1 July 2004 to 30 June 2005 were **you** and **your spouse – married or de facto** (if you had one) covered by private patient HOSPITAL cover?

E **YES** You **must** complete **Private health insurance policy details** above. You have now finished this item.

NO Read on.

For the whole of 2004–05 were you:

- **a single person** and your taxable income for MLS purposes (including your total reportable fringe benefits amounts) was \$50,000 or less, **OR**
- **married** or in a de facto relationship and the combined taxable income for MLS purposes (including the total reportable fringe benefits amounts) of you and your spouse was \$100,000 or less?

NO You may have to pay the surcharge. Read pages 73–7 in *Retirees TaxPack 2005*.

YES You do not have to pay the surcharge. You must write **365** at **A**.

You must write the following at **A**:

- **0** when you have to pay the surcharge for the whole period 1 July 2004 to 30 June 2005
- **365** when you do NOT have to pay the surcharge for the whole period 1 July 2004 to 30 June 2005
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 2004 to 30 June 2005.

Number of days you do NOT have to pay the surcharge **A**

If you had a spouse during 2004–05 complete **Spouse details – married or de facto** on page 5 of your tax return.

If you were covered by private patient hospital cover at any time during 2004–05 you must complete **Private health insurance policy details** above.

Make sure you sign the Taxpayer’s declaration on page 6 of your tax return.

Spouse Details – Married or De Facto

If you completed any of the items listed below, and you had a spouse during 2004–05, you must complete **Spouse details – married or de facto**. We need the information included in this section to assess your tax accurately.

Did you complete any of the following items?

- | | |
|---|---|
| 19 Spouse tax offset | 26 Medicare levy reduction or exemption |
| 20 Senior Australians tax offset | 27 Medicare levy surcharge – and you printed X in the NO box at E |
| 21 Pensioner tax offset | |

NO You do not need to complete this section. Go to page 6 of your tax return.

YES You need to complete this section. Complete the information required below then go to page 6 of your tax return.

Spouse's date of birth **K**

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Did you have a spouse for the full year – 1 July 2004 to 30 June 2005? **L** **YES** **NO**

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 2004 and 30 June 2005.

From

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

To

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The information below relates to your spouse's income. The following list shows which details you need to complete.

If you have completed:

<input type="checkbox"/> item 19	complete R
<input type="checkbox"/> item 20 or 21	complete O , T , P and Q
<input type="checkbox"/> item 26 (V or W)	complete O
<input type="checkbox"/> item 27 and you printed X in the NO box at E	complete O , T , U and S if you had a spouse for all of 2004–05 or your spouse died during the year.

For any of the following that you are required to complete, if the amount is zero, do not leave blank – write **0**.

Spouse's 2004–05 taxable income **O**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Your spouse's share of trust income on which the trustee is assessed under section 98 and which has not been included in spouse's taxable income **T**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Distributions to your spouse on which family trust distribution tax has been paid which your spouse would have had to show as assessable income if the tax had not been paid **U**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Your spouse's total reportable fringe benefits amounts **S**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Australian Government pensions and allowances are listed on page 16 in *Retirees TaxPack 2005*.

Amount of Australian Government pensions and allowances that your spouse received in 2004–05 **P**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Exempt income is listed on page 5 in *Retirees TaxPack 2005*.

Amount of any exempt pension income that your spouse received in 2004–05 (make sure you only include your spouse's exempt **pension** income) **Q**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

See pages 51–2 in *Retirees TaxPack 2005* for information on separate net income.

Your spouse's 2004–05 separate net income **R**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

Is your tax return complete?

Before you lodge your tax return, check that you have:

- written your tax file number at the top of page 1 of your tax return
- filled in all your personal details on page 1 of your tax return
- filled in the appropriate details on page 1 of your tax return if you want to use electronic funds transfer to have your refund paid directly into your financial institution account
- filled in the code boxes – if applicable – at items **20** and **21**
- completed item **27** – it is compulsory for all taxpayers
- completed **Spouse details – married or de facto**, if applicable
- completed **Private health insurance policy details**, if applicable
- written totals at **TOTAL TAX WITHHELD, TOTAL INCOME, TOTAL DEDUCTIONS, TAXABLE INCOME** and **TOTAL TAX OFFSETS**
- attached to the top left-hand corner of page 3 of your tax return copies of your payment summaries and other requested documents
- signed and dated the *Taxpayer's declaration* below.

Commissioner's guarantee

Taxpayers who use *Retirees TaxPack 2005* properly to complete their tax return are protected by the Commissioner's guarantee. The guarantee is on the inside front cover of *Retirees TaxPack 2005*.

TAXPAYER'S DECLARATION

All taxpayers must sign and date the declaration below.

I declare that:

- all the information I have given in this tax return, including any attachments, is true and correct
- I have shown all my income – including net capital gains – for tax purposes from sources in and out of Australia for 2004–05
- I have completed item **27** – Medicare levy surcharge
- I have the necessary receipts and/or other records – or expect to obtain the necessary written evidence within a reasonable time of lodging this tax return – to support my claims for deductions and tax offsets, and
- I understand the Australian Taxation Office (ATO) has the right to review my tax return and, for a period of up to 6 years, to issue me with a revised assessment if a review shows any inaccuracies in income or entitlements that change my assessment.

Did *Retirees TaxPack 2005* ask you to attach additional information to your tax return?

NO YES

Privacy

It is not an offence not to quote your tax file number (TFN). However, your assessment will be delayed if you do not quote your TFN.

The ATO is authorised by the *Income Tax Assessment Act 1936* and the *Income Tax Assessment Act 1997* to ask for information on this tax return. We need this information to help us to administer the taxation laws.

We may give this information to other government agencies authorised by law to receive it – for example, benefit payment agencies such as Centrelink, the Department of Education, Science and Training and the Department of Family and Community Services; law enforcement agencies such as the Australian Crime Commission; and other agencies such as the Child Support Agency, the Australian Bureau of Statistics and the Reserve Bank of Australia.

IMPORTANT

The tax law imposes heavy penalties for giving false or misleading information.

**FOR YOUR TAX RETURN TO BE VALID
YOU MUST SIGN BELOW.**

Date

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Use the pre-addressed envelope provided with *Retirees TaxPack 2005* to lodge your tax return.
For more information, read page 79 in *Retirees TaxPack 2005*.**