



<b>1 Commonwealth of Australia government pensions and allowances</b>	Tax withheld—do not show cents <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"/> <input type="text"/> <input type="text"/> 00	Income—do not show cents <b>B</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	TAX OFFSET <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"/> <input type="text"/> <input type="text"/> CODE
	If you had a spouse during 2002–03 complete <b>Spouse details—married or de facto</b> on page 5 of your tax return.		You may be able to get a tax offset if you have income at item 1. To get a tax offset, print your correct tax offset code letter here.
<b>2 Other Australian pensions or annuities—including superannuation pensions</b>	Type <input type="text"/>	Tax withheld—do not show cents <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"/> <input type="text"/> <input type="text"/> <input type="text"/> 00	<b>J</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>3 Foreign source pension or annuity income</b>	Assessable foreign source income <b>E</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Net foreign pension or annuity income WITHOUT an undeducted purchase price <b>L</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	<b>P</b> BOX
		Net foreign pension or annuity income WITH an undeducted purchase price <b>D</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<b>4 Salary, wages, allowances, earnings etc.</b>		Tax withheld—do not show cents <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"/> <input type="text"/> <input type="text"/> <input type="text"/> 00	<b>C</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>5 TOTAL TAX WITHHELD</b>		<b>\$</b> <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"/> <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.
<b>6 Total reportable fringe benefits amounts</b>	<b>W</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>		
<b>7 Gross interest</b>	Tax file number amounts withheld from gross interest <b>M</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	Gross interest <b>L</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<b>8 Dividends</b>	Tax file number amounts withheld from dividends <b>V</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	Unfranked amount <b>S</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
		Franked amount <b>T</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
		Imputation credit <b>U</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<b>9 Capital gains</b>	Did you have a capital gains tax event during the year? <b>G</b> <b>NO</b> <input type="checkbox"/> <b>YES</b> <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 <b>A</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	
	Total current year capital gains <b>H</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>		
	Net capital losses carried forward to later income years <b>V</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>		
<b>10 TOTAL INCOME</b>		<b>\$</b> <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"/> <input type="text"/> <input type="text"/> <input type="text"/>	Add up all the income amounts in the right-hand column—items 1 to 9.



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 36–49 in *Retirees TaxPack 2003* will help you to correctly claim all your deductions.

Deductions—do not show cents

**11** Subscriptions

**E**   ,     .00

**12** Interest and dividend deductions

**I**   ,     .00

**13** Gifts or donations

**J**   ,     .00

**14** Deductible amount of undeducted purchase price of an Australian pension or annuity

**L**   ,     .00

**15** Deductible amount of undeducted purchase price of a foreign pension or annuity

**Y**   ,     .00

**16** Cost of managing tax affairs

**M**   ,     .00

**17** TOTAL DEDUCTIONS

Add up all the deduction amounts at items 11 to 16. \$    ,     .00

**18** TAXABLE INCOME

Subtract the amount at item 17 from the amount at item 10. \$     ,     .00

## TAX OFFSETS

Pages 50–71 in *Retirees TaxPack 2003* will help you to correctly claim your tax offsets.

Tax offsets—do not show cents

**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.

**P**   ,     .00

**20** Senior Australians

The ATO will work out this tax offset amount. Print your code letter in the **TAX OFFSET CODE** box. Read pages 55–7 in *Retirees TaxPack 2003*.

**N**  **TAX OFFSET CODE**

If you had a spouse during 2002–03 you must also complete **Spouse details—married or de facto** on page 5 of your tax return.

**21** Superannuation annuity and pension

**S**   ,     .00 **A**

**22** 30% private health insurance

Amount of refundable tax offset—not contributions **G**   ,     .00

You must complete **Private health insurance policy details** below.

**23** 20% tax offset on net medical expenses over the threshold amount

**X**   ,     .00

**24** TOTAL TAX OFFSETS

Add up all the tax offset amounts at items 19 to 23. \$    ,     .00

The ATO will work out any tax offset for low income. Read page 71 in *Retirees TaxPack 2003* for more information.

## PRIVATE HEALTH INSURANCE POLICY DETAILS

Pages 71–2 in *Retirees TaxPack 2003* will help you to correctly fill in your details.

You must provide the details for each policy if item 22 or 26 asked you to complete this section.

Health fund ID

Membership number

Type of cover

**B**

**C**

**B**

**C**

**B**

**C**

**B**

**C**

**B**

**C**

## 25 Medicare levy reduction or exemption

### NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read question 25 in *Retirees TaxPack 2003* 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 25 and had a spouse during 2002–03 you must also complete **Spouse details—married or de facto** on page 5 of your tax return.

## 26 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 77–81 in *Retirees TaxPack 2003*.

For the **whole** period 1 July 2002 to 30 June 2003 were **you** and **your spouse—married or de facto** (if you had one)—covered by private patient HOSPITAL cover?

**YES**  You must complete **Private health insurance policy details** on page 3 of your tax return. You have now finished this item.

**E**

**NO**  Read on.

For the whole of 2002–03 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**—including 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 77–81 in *Retirees TaxPack 2003*.

**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 2002 to 30 June 2003
- '365' when you do NOT have to pay the surcharge for the whole period 1 July 2002 to 30 June 2003
- the number of days you do NOT have to pay the surcharge for part of the period 1 July 2002 to 30 June 2003.

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

If you had a spouse during 2002–03 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 2002–03 you must complete **Private health insurance policy details** on page 3 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 2002–03, you must complete **Spouse details—married or de facto**. We need the information included in this section to accurately assess your tax obligations.

## Did you complete any of the following items?

- |                                                                                                                                                                |                                                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>1</b> Commonwealth of Australia government pensions and allowances</p> <p><b>19</b> Spouse tax offset</p> <p><b>20</b> Senior Australians tax offset</p> | <p><b>25</b> Medicare levy reduction or exemption</p> <p><b>26</b> Medicare levy surcharge—and you printed <b>X</b> in the <b>NO</b> box at <b>E</b></p> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|

**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

Did you have a spouse for the full year—1 July 2002 to 30 June 2003? **L** **YES**  **NO**

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 2002 and 30 June 2003.

**M**          
Day      Month      Year

**N**          
Day      Month      Year

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

If you have completed:

- item **1** or **20**... complete **O**, **T**, **P** and **Q**
- item **19**... complete **R**
- item **25** (**V** or **W**)... complete **O**
- item **26** and you printed **X** in the **NO** box at **E**... complete **T**. If you had a spouse for all of 2002–03 also complete **O**, **U** and **S**.

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

Spouse's 2002–03 taxable income **O**

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**

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**

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

Commonwealth of Australia government pensions and allowances are listed on page 14 in *Retirees TaxPack 2003*.

Amount of Commonwealth of Australia government pensions and allowances that your spouse received in 2002–03 **P**

Exempt income is listed on page 5 in *Retirees TaxPack 2003*.

Amount of any exempt pension income that your spouse received in 2002–03 (make sure you only include your spouse's exempt **pension** income) **Q**

See pages 50–2 in *Retirees TaxPack 2003* for information on separate net income.

Your spouse's 2002–03 separate net income **R**

## 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 **1** and **20**
- completed item **26—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 2003* properly to complete their tax return are protected by the Commissioner's guarantee. The guarantee is on the inside front cover of *Retirees TaxPack 2003*.

## 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 2002–03
- I have completed item **26**—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 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 entitlement that change my assessment.

**Did *Retirees TaxPack 2003* 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 National Crime Authority; 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

Use the pre-addressed envelope provided with *Retirees TaxPack 2003* to lodge your tax return.

For more information, read page 83 in *Retirees TaxPack 2003*.