



7 Why are you claiming a refund?

You can only claim a refund directly from us if you can claim an exemption from quoting a TFN or ABN from your investment body, but have not done so. **If you cannot select one of the boxes below, you cannot receive a direct refund and you must lodge a tax return to claim a credit for the TFN amounts deducted.**

Individuals	Non-individuals
<p>I am claiming a refund because I receive the following pension or benefit (or both):</p> <p><input type="checkbox"/> age pension <input type="checkbox"/> special needs pension</p> <p><input type="checkbox"/> disability support pension <input type="checkbox"/> carer payment</p> <p><input type="checkbox"/> wife pension <input type="checkbox"/> special benefit, or</p> <p><input type="checkbox"/> parenting payment (single) <input type="checkbox"/> veterans' affairs pension with a pensioner concession card.</p> <p><input type="checkbox"/> widow B pension</p> <p> For more information phone us on 13 28 61.</p>	<p>The entity is claiming a refund because:</p> <p><input type="checkbox"/> the account is in the name of a society, club or other organisation whose income is exempt under Division 50 of the <i>Income Tax Assessment Act 1997</i>, or</p> <p><input type="checkbox"/> the account is the name of a non-profit company whose taxable income is not more than \$416 per annum.</p> <p> For more information phone us on 13 28 66.</p>

8 Provide details of your refund claim and attach evidence

Bank or Investment body name	Account number	Date deducted	Amount \$
Total of refund			

Documentary evidence

You must provide evidence to support your claim. Examples of acceptable documents include photocopies of passbooks, account statements, written advices on the investment body's letterhead, term deposit advice, dividend statements and unit trust distribution advices. The photocopies must clearly show the name of the account, the account number, the name of the investment body, the amount deducted and the date the amount was deducted. **Do not send original documents.**

Section B: Declaration – must be completed by the account holder (or holders) or an authorised person if you are a non-individual or entity

Before you sign this form

Check that the information you have provided is true and correct.

Penalties

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

Privacy

Taxation law authorises the ATO to collect information including personal information about the person authorised to sign the declaration. For information about your privacy, go to ato.gov.au/privacy

I/We have notified the investment body of the account holder (or holders) TFN or ABN, or exemption status.

I/We declare that this is the first and final claim for a refund of this amount. It will not be claimed in a tax return or from the investment body.

If a joint account, all account holders applying for a refund must sign. If there are more than two account holders, attach additional details.

Print name

Position or title (non-individual)

Signature

Date / /

Print name

Position or title (non-individual)

Signature

Date / /

Lodging your application

Keep a copy of this completed application for your own records and send the original with supporting documentation to:

Australian Taxation Office
PO Box 1032
ALBURY NSW 2640