



2003 tax return for individuals

Use *TaxPack 2003* 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.

IMPORTANT: Complete your details carefully to avoid delays in processing your tax return.

1 July 2002 to
30 June 2003

www.ato.gov.au

Your tax file number (TFN)

See the **Privacy** note in the *Taxpayer's declaration* on page 8 of your tax return.

Are you an Australian resident?

See page 10 in *TaxPack 2003*.

YES

NO

Your sex

Male

Female

Your name

Print your full name.

Title—for example,
Mr, Mrs, Ms, Miss

Surname or
family name

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

Given names

NO

YES

Previous surname

Your postal address

Print the address where you
want your mail sent.

Has this address changed since
completing your last tax return?

Fill in the appropriate box then read on.

NO

YES

Suburb or
town

State

Postcode

Country
if not
Australia

Is your home address different
from your postal address?

NO

Read on.

YES

Print your home address.

Suburb or
town

State

Postcode

Country
if not
Australia

Your date of birth

If you were under 18 years of age on 30 June 2003
you must complete item **A1** on page 6 of your tax return.
Read page 102 in *TaxPack 2003* for more information.

Day

Month

Year

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

Your telephone number during business hours—if we need to ask you about your tax return, it is quicker by telephone.

Area
code

Telephone
number

Your spouse's name

If you had more than one spouse
during 2002–03 print the name of
your latest spouse.

Surname or
family name

Given names

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

YES

DON'T KNOW

NO

FINAL

Do you want to use electronic funds transfer (EFT) this year for your tax refund or family tax benefit
payment where applicable? Read page 11 in *TaxPack 2003* for more information.

NO

Read on.

YES

If you used EFT last year and the account details you provided are correct, do not write them again.
Otherwise complete BSB number, account number and account name below.

BSB number
Must be six digits.

Account number

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

Your main salary and wage occupation

1 Salary or wages

Description

Payer's Australian business number

Tax withheld—do not show cents

Income—do not show cents

C
D
E
F
G

2 Allowances, earnings, tips, director's fees etc.

K

3 Lump sum payments

Amount A in lump sum payments box

R

5% of amount B in lump sum payments box

H

TYPE

4 Eligible termination payments (ETP)

Attach the 'Payee's Tax Return Copy' of your ETP payment summary or letters to page 3 of your tax return.

Taxable amount other than excessive component

I

Excessive component

N

5 Commonwealth of Australia government allowances and payments like Newstart, youth allowance and austudy payment

A

6 Commonwealth of Australia government pensions and allowances

If you had a spouse during 2002–03 complete **Spouse details—married or de facto** on pages 6–7 of your tax return.

B

Y
VETERAN CODE

TAX OFFSET

CODE

7 Other Australian pensions or annuities—including superannuation pensions

Type

J

8 Attributed personal services income

O

TOTAL TAX WITHHELD

\$

For items 1 to 8 add up all the amounts in the tax withheld column.

9 Total reportable fringe benefits amounts

W

10 Gross interest

If you are a non-resident make sure you have printed your country of residence on page 1 of your tax return.

Gross interest

L

Tax file number amounts withheld from gross interest

M

11 Dividends

If you are a non-resident make sure you have printed your country of residence on page 1 of your tax return.

Unfranked amount

S

Franked amount

T

Tax file number amounts withheld from dividends

V

Imputation credit

U

Only used by taxpayers completing the 2003 tax return for individuals (supplementary section)

I Transfer the amount from **TOTAL SUPPLEMENTARY INCOME OR LOSS** on page 11 and write it here.

LOSS

TOTAL INCOME OR LOSS

Add up all the income amounts and deduct any loss amount in the right-hand column.

\$

LOSS



Attach your '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 36–62 in *TaxPack 2003* will help you to correctly fill in the items below.

You must read pages 36–7 in *TaxPack 2003* if you are claiming deductions for expenses that relate to your work as an employee at items D1–D6.

		Deductions—do not show cents		CLAIM TYPE
D1	Work related car expenses	A	<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="checkbox"/>
D2	Work related travel expenses	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"/>	
D3	Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses	C	<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="checkbox"/>
D4	Work related self-education expenses	D	<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="checkbox"/>
D5	Other work related expenses	E	<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"/>	
D6	Low value pool deduction	K	<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"/>	

D7	Interest and dividend deductions	I	<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"/>	
D8	Gifts or donations	J	<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"/>	
D9	Deductible amount of undeducted purchase price (UPP) 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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
You will find information on deductible amount of UPP of a foreign pension or annuity at question D12 in <i>TaxPack 2003 supplement</i> .				
D10	Cost of managing tax affairs	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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Only used by taxpayers completing the 2003 tax return for individuals (supplementary section)

D	Transfer the amount from TOTAL SUPPLEMENT DEDUCTIONS on page 11 and write it here.	<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"/>
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TOTAL DEDUCTIONS	Add up all the deduction amounts items D1 to D .	\$ <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"/>
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SUBTOTAL	TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS	\$ <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"/>	LOSS <input type="checkbox"/>
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LOSSES

Pages 63–4 in *TaxPack 2003* will help you to correctly fill in the item below.

L1	Tax losses of earlier income years claimed this income year	Primary production	F	<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"/>
		Non-primary production	Z	<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"/>

TAXABLE INCOME OR LOSS	If you did not complete L1 write the amount from SUBTOTAL here.	\$ <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"/>	LOSS <input type="checkbox"/>
	If you did complete L1 you must read page 65 in <i>TaxPack 2003</i> .		

Make sure that you complete item M2. See pages 98–101 in *TaxPack 2003*.

M1 Medicare levy reduction or exemption

NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read pages 94–7 in *TaxPack 2003* to work out if you are eligible to claim.

Reduction based on family income

Number of dependent children and students **Y**

Exemption categories

Full 1.5% levy exemption—number of days **V** **CLAIM**

Half 1.5% levy exemption—number of days **W** **TYPE**

If you have completed item **M1** and had a spouse during 2002–03 you must also complete **Spouse details—married or de facto** on pages 6–7 of your tax return.

M2 Medicare levy surcharge (MLS)



THIS ITEM IS COMPULSORY FOR ALL TAXPAYERS.

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

To help you determine if you have to pay the surcharge read pages 98–101 in *TaxPack 2003*.

For the **whole** period 1 July 2002 to 30 June 2003 were **you** and **all** of your dependants (including your spouse)—if you had any—covered by private patient HOSPITAL cover?

E **YES** You **must** complete **Private health insurance policy details** on page 4 of your tax return. You have now finished this item.

NO Read on.

For the whole of 2002–03 were you:

- **a single person**—without a dependent child or children—and your taxable income for MLS purposes (including your total reportable fringe benefits amounts) was \$50,000 or less, OR
- **a member of a family**—which may consist of a couple (married or de facto) with or without a dependent child or children; or a sole parent with a dependent child or children—and the combined taxable income for MLS purposes (including the total reportable fringe benefits amounts) of you and your spouse (if you had one) was \$100,000 (plus \$1,500 for each dependent child after the first) or less?

NO You may have to pay the surcharge—read pages 98–101 in *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**

Number of dependent children **D**

If you had a spouse during 2002–03 complete **Spouse details—married or de facto** on pages 6–7 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**—see page 92 in *TaxPack 2003*.

Make sure you have checked on page 6 that you need to complete **Spouse details—married or de facto**.

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

If you have completed:

- item **6** or **T2**... complete **O**, **T**, **P** and **Q**
- item **T1**... complete **R**
- item **M1** (**V** or **W**)... complete **O**
- item **M1** (**Y** only)... complete **O** if you had a spouse on 30 June 2003
- item **M2** 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**
- item **T6**... complete **O** 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** , .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** , .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** , .00

Your spouse's total reportable fringe benefits amounts **S** , .00

Commonwealth of Australia government pensions and allowances are listed on page 23 in *TaxPack 2003*.

Amount of Commonwealth of Australia government pensions and allowances that your spouse received in 2002–03 **P** , .00

Exempt income is listed on page 12 in *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** , .00

See pages 66–7 in *TaxPack 2003* for information on separate net income.

Your spouse's 2002–03 separate net income **R** , .00

Consent to use part or all of your 2003 tax refund to repay your spouse's family tax benefit (FTB) overpayment

Only complete the details below if:

- you were the spouse of an FTB claimant on 30 June 2003 and your income was taken into account in their claim—check with your spouse—AND
- your spouse has given you authority to quote on your tax return their customer reference number (CRN). If your spouse does not know their CRN they can contact the Family Assistance Office, AND
- your spouse expects to have an FTB overpayment for 2003, AND
- you expect to receive a tax refund for 2003, AND
- you consent to use part or all of your tax refund to repay your spouse's FTB overpayment.

Note: An FTB overpayment can only be raised after reconciliation has been completed. If an FTB overpayment is raised after your refund has been sent to you the ATO will not be able to use your refund to repay the FTB overpayment.

Spouse's CRN

Spouse's sex

Male Female

Spouse's name

Print full name.

Surname or family name

Given names

Spouse's date of birth

Day Month Year

I consent to the ATO using part or all of my 2002–03 tax refund to repay the 2003 FTB overpayment of my spouse, whose details I have provided above. I have obtained my spouse's permission to quote their CRN.

Your signature for FTB purposes only

Date

Day Month Year

TAXPAYER'S DECLARATION

All taxpayers must sign and date the declaration below.

Read and answer the questions below before you sign the *Taxpayer's declaration*.

1 Are you required to complete any of the items in the 2003 tax return for individuals (supplementary section)—pages 9–12? Read page 7 in *TaxPack 2003* to find out.

NO Go to question 2. YES Attach pages 9–12 to this page.

2 Has *TaxPack* asked you to attach the following?

- a. any attachments relating to specific questions—to page 3 of your tax return NO YES
- b. *2003 business and professional items schedule*—to page 3 of your tax return NO YES

These attachments are in addition to your payment summaries and other requested attachments which you must attach to your tax return.

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*, the *Income Tax Assessment Act 1997* and the *A New Tax System (Family Assistance) (Administration) Act 1999* 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.

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 for 2002–03
- I have completed and attached the supplementary section, schedules and other attachments—as appropriate—that *TaxPack 2003* told me to provide
- I have completed item **M2**—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
- 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 entitlements that change my assessment.

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 *TaxPack 2003* to lodge your tax return.

For more information, read page 106 in *TaxPack 2003*.