



1 July 2004 to 30 June 2005

Use 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 input

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

Are you an Australian resident?

See page 14 in TaxPack 2005.

YES NO checkboxes

Your sex

Male Female checkboxes

Your name

Print your full name.

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

Surname or family name grid

Given names grid

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

NO YES checkboxes with arrow

Previous surname grid

Your postal address

Print the address where you want your mail sent.

Postal address grid

Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO YES checkboxes

Suburb or town grid

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 grid

State Postcode Country if not Australia

Your date of birth

If you were under 18 years of age on 30 June 2005 you must complete item A1 on page 6 of your tax return. Read page 109 in TaxPack 2005 for more information.

DAY MONTH YEAR grid

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 grid

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

Given names grid

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

YES DON'T KNOW NO FINAL TAX RETURN checkboxes

Do you want to use electronic funds transfer (EFT) this year for your tax refund or family tax benefit payment where applicable? Read pages 14-15 in 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 Account number grid

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

Account name grid

1	Salary or wages	Your main salary and wage occupation Description <input style="width:100%;" type="text"/>	
	Payer's Australian business number <input style="width:100%;" type="text"/>	Tax withheld – do not show cents <input style="width:100%;" type="text"/>	Income – do not show cents C <input style="width:100%;" type="text"/>
	<input style="width:100%;" type="text"/>	<input style="width:100%;" type="text"/>	D <input style="width:100%;" type="text"/>
	<input style="width:100%;" type="text"/>	<input style="width:100%;" type="text"/>	E <input style="width:100%;" type="text"/>
	<input style="width:100%;" type="text"/>	<input style="width:100%;" type="text"/>	F <input style="width:100%;" type="text"/>
	<input style="width:100%;" type="text"/>	<input style="width:100%;" type="text"/>	G <input style="width:100%;" type="text"/>
2	Allowances, earnings, tips, director's fees etc	<input style="width:100%;" type="text"/>	K <input style="width:100%;" type="text"/>
3	Lump sum payments	<input style="width:100%;" type="text"/>	Amount A in lump sum payments box R <input style="width:100%;" type="text"/> <small>TYPE</small> <input style="width:20px;" type="text"/>
		<input style="width:100%;" type="text"/>	5% of amount B in lump sum payments box H <input style="width:100%;" type="text"/>
4	Eligible termination payments (ETP)	Taxable amount other than excessive component <input style="width:100%;" type="text"/>	I <input style="width:100%;" type="text"/>
	Attach the 'Payee's Tax Return Copy' of your ETP payment summary or letters to page 3 of your tax return.	Excessive component <input style="width:100%;" type="text"/>	N <input style="width:100%;" type="text"/>
5	Australian Government allowances and payments like Newstart, youth allowance and austudy payment	<input style="width:100%;" type="text"/>	A <input style="width:100%;" type="text"/>
6	Australian Government pensions and allowances	<input style="width:100%;" type="text"/>	B <input style="width:100%;" type="text"/>
	You must complete item T2 or T3 in Tax offsets .		
7	Other Australian pensions or annuities – including superannuation pensions	<input style="width:100%;" type="text"/>	J <input style="width:100%;" type="text"/>
	Type <input style="width:100%;" type="text"/>		
8	Attributed personal services income	<input style="width:100%;" type="text"/>	O <input style="width:100%;" type="text"/>
TOTAL TAX WITHHELD		\$ <input style="width:100%;" type="text"/>	← For items 1 to 8 add up all the amounts in the tax withheld column.
9	Total reportable fringe benefits amounts	W <input style="width:100%;" type="text"/>	
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 <input style="width:100%;" type="text"/>
	Tax file number amounts withheld from gross interest M <input style="width:100%;" type="text"/>		
11	Dividends	Unfranked amount S <input style="width:100%;" type="text"/>	
	If you are a non-resident make sure you have printed your country of residence on page 1 of your tax return.	Franked amount T <input style="width:100%;" type="text"/>	
	Tax file number amounts withheld from dividends V <input style="width:100%;" type="text"/>	Franking credit U <input style="width:100%;" type="text"/>	
Only used by taxpayers completing the Tax return for individuals (supplementary section) 2005			
I	Transfer the amount from TOTAL SUPPLEMENT INCOME OR LOSS on page 11 and write it here.		\$ <input style="width:100%;" type="text"/> <small>LOSS</small> <input style="width:20px;" type="text"/>
TOTAL INCOME OR LOSS		Add up all the income amounts and deduct any loss amount in the right-hand column.	\$ <input style="width:100%;" type="text"/> <small>LOSS</small> <input style="width:20px;" type="text"/>

M1 Medicare levy reduction or exemption



NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read pages 101–4 in *TaxPack 2005* 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**

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

CLAIM
TYPE

If you have completed item **M1** and had a spouse during 2004–05 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 105–8 in *TaxPack 2005*. For the **whole** period 1 July 2004 to 30 June 2005 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 2004–05 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 105–8 in *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**

Number of dependent children **D**

If you had a spouse during 2004–05 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 2004–05 you **must** complete **Private health insurance policy details**. See page 99 in *TaxPack 2005*.

Make sure you sign the Taxpayer's declaration on page 8 of your tax return.

SPOUSE DETAILS – MARRIED OR DE FACTO – continued

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 T1	complete R
■ item T2 or T3	complete O , T , P and Q
■ item M1 (V or W)	complete O
■ item M1 (Y only)	complete O if you had a spouse on 30 June 2005
■ item M2 and you printed <input checked="" type="checkbox"/> 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
■ item T7	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 2004–05 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 your 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**

Australian Government pensions and allowances are listed on page 28 in *TaxPack 2005*.

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

Exempt income is listed on pages 16–17 in *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**

See pages 73–4 in *TaxPack 2005* for information on separate net income.

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

Consent to use part or all of your 2005 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 2005 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 2005, AND
- you expect to receive a tax refund for 2005, 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 Tax Office will not be able to use your refund to repay the FTB overpayment.

Spouse's CRN

Spouse's sex Male Female

Spouse's name Surname or family name

Print full name. Given names

Spouse's date of birth DAY MONTH YEAR

I consent to the Tax Office using part or all of my 2004–05 tax refund to repay the 2005 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 Tax return for individuals (supplementary section) 2005 – pages 9–12? Read page 8 in TaxPack 2005 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. *Business and professional items schedule for individuals 2005* – 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 Australian Taxation Office (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 Australian Crime Commission; 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 2004–05
- I have completed and attached the supplementary section, schedules and other attachments – as appropriate – that *TaxPack 2005* 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 six 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 2005 to lodge your tax return.
For more information, read page 113 in TaxPack 2005.**