



# Copies of returns request – individuals and authorised representatives

Individuals or their authorised representatives can use this form to request copies of notices of assessment, lodged tax returns and group certificates or payment summaries.

## SIGNATURE REQUIREMENTS

The request must be signed by the taxpayer or their authorised representative. Refer to section C on page 2 or section D on page 3.

## HOW TO MAKE A REQUEST?

You can use this form. A covering letter is not required. We will make all efforts to provide you with the response within 28 days.

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## Section A: Applicant's details

Tax file number (TFN)

OR

Australian business number (ABN)

### Name

Title: Mr  Mrs  Miss  Ms  Other

Family name

First given name

Other given name/s

Date of birth  <sup>Day</sup> /  <sup>Month</sup> /  <sup>Year</sup>

### Postal address (taxpayer/tax agent/legal representative)

Suburb/town

State/territory

Postcode

Country (if not Australia)

Phone number

Mobile number

## Section B: Copies of tax documents

**!** Select only one option.

Print from the ATO's electronic record  **Tax return(s)** from  <sup>Year</sup> to  <sup>Year</sup>

Photocopy of the original paper tax returns (may take longer to provide)

**Notice(s) of assessment** from  <sup>Year</sup> to  <sup>Year</sup>

**Payment summaries** from  <sup>Year</sup> to  <sup>Year</sup>

## Section C: Declaration

**!** If you are:

- requesting your own tax documents, you must complete question 1
- a public trustee, tax agent or executor, you must complete question 2
- a legal representative (for example, a lawyer), you do not need to complete this section. You must complete section D on page 3.

### 1 INDIVIDUAL

Name (print)

Signature of applicant

Date

<sup>Day</sup> /  <sup>Month</sup> /    <sup>Year</sup>

### 2 PUBLIC TRUSTEE, TAX AGENT OR EXECUTOR

Name (print)

Tax agent registration number (if applicable)

Phone number

Fax number

Signature of person authorised

Date

<sup>Day</sup> /  <sup>Month</sup> /    <sup>Year</sup>

**!** If you are:

- a public trustee, you must provide a certificate of authority
- an executor, you must provide copies of the will, death certificate, probate or letter of administration
- a tax agent, you must provide a *Notice of appointment of legal practitioner as agent on behalf of an entity form* (NAT 15898). If you have already registered your client with us, you do not need to provide this form.

## Section D: Authority for legal representative to obtain taxpayers records

I hereby authorise

of

whose signature appears below, to obtain access to the documents described above.

Client's name

Client's signature

Date

Day / Month / Year  
 /  /

Representative's name

Phone number

Fax number

Representative's signature

Date

Day / Month / Year  
 /  /

This authority is valid:

from  Day /  Month /  Year to  Day /  Month /  Year

## Section E: Checklist

Ensure that you have a written authorisation to act on behalf of the individual.

Have you attached any documentation that may be required for proof of identity (POI)?

Accepted POI documents include:

- Litigation Guardian administration order
- enduring Power of Attorney
- a copy of a will or probate or letters of administration.

 MORE INFORMATION

If you need more information about completing this form, call us on **13 28 61**.

## How to lodge your form

 Complete this form electronically, then print and sign the form before sending it to us.

You do not need to include a cover letter with this form.

Send the completed form and payment (if required) to us by mail to:

**Australian Taxation Office**  
**PO Box 3006**  
**PENRITH NSW 2740**

If payment is not required, you can send the completed form to us by fax on **1300 730 298**.