



Australian resident investor – refund for TFN amounts deducted

Use this form to apply for a refund withheld by investment bodies if you didn't provide your TFN or ABN.

Last updated 22 July 2024

Get the form

Download [Application by an Australian resident investor for refund of tax file number amounts deducted \(NAT 1846, PDF 212KB\)](#) .

What you can do with this form

Use this form to claim a refund of amounts withheld by investment bodies when tax was withheld because you didn't:

- quote your tax file number (TFN)
- quote your Australian business number (ABN)
- advise of your exemption from quoting either of these.

These amounts may have been withheld from interest, dividends or unit trust distributions. An investment body could be your bank, building society, credit union, a company that you own shares in or a unit trust.

You can only claim a refund if you received one of the following pensions or benefits and amounts were withheld:

- age pension
- disability support pension
- wife pension

- parenting payment (single)
- widow B pension
- special needs pension
- carer payment
- special benefit
- veterans' affairs pension with a pensioner concession card.

If you didn't receive any of these, you can **lodge a tax return** to claim the refund.

An entity can claim a refund if either:

- the account is in the name of a society, club or other organisation whose income is exempt under Division 50 of the *Income Tax Assessment Act 1997*
- the account is the name of a non-profit company whose taxable income is not more than \$416 a financial year.

If you are not an Australian resident for tax purposes and TFN withholding tax has been deducted from your investment income, see **Refund of over-withheld withholding: how to apply**.

How to lodge your form

Send your completed application and supporting documentation to:

Australian Taxation Office
PO Box 1032
ALBURY NSW 2640

Remember to keep a copy of your application form for your records. Do not send the originals of your supporting documentation to us.

QC 16544

Our commitment to you

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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