



## Section B: Fund member details

### 6 What is the name of the fund, company or authority paying your pension or annuity?

(some of the government bodies are neither funds nor companies)


### 7 On what date did your pension or annuity commence (this is the first day of the first payment period of the pension)?

For example, if your pension is paid monthly, and the first payment is made on 1 March 2007 and the payment relates to the previous month the date on which the pension commenced is 1 February 2007.

Day	Month	Year
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### 8 What is the exact amount of personal contributions you made to your pension fund, in the currency the contributions were made (this does not include accrued interest or employer contributions)?

! Include documentary evidence in English from your pension or annuity provider to confirm this amount. If documentary evidence is not provided we cannot calculate your UPP.

Currency

Amount ,,.

### 9 Do you receive a German pension?

No  Yes  Attach your insurance resume (Versicherungsverlauf).

### 10 Do you receive an Austrian social security pension?

No  Yes  Provide a copy of the Calculation of Assessment Basis statement.

### 11 Do you receive an Italian government pension?

No  Yes  Attach photocopies (the front and back) of Article 10 (formerly Article 17) letter, for the year and immediate prior year for which you are requesting the private ruling.

### 12 Did you receive a lump sum payment from your pension provider when you retired/started receiving your pension?

No  Yes  Provide the following details

Amount of the lump sum payment you received from your pension fund

Amount in foreign currency  
,,.

Value of your pension entitlement the day before you received your lump sum benefit?

(This is the actuarial calculation of the total pension entitlement payable over the life of the pension). Your pension provider should be able to provide this information.

,,.

Is your pension indexed (that is, does it increase annually)?

No  Yes  By how much:

Consumer Price Index (or foreign equivalent)  % annual increase

Other  Provide details

What is the annual amount of your pension paid in the first year?

Amount in foreign currency  
,,.

! Include documents in English as evidence.

### 13 Did you start receiving your pension before you came to Australia?

No  Yes  What date did you become an Australian resident for taxation purposes?

Day Month Year  
 /  /

**14 How often do you receive your pension payments (for example, fortnightly, monthly or other)?  
Provide details.**

**15 Is your pension payable for a set period of time (a fixed term pension)?**

No

Yes

How long is this period?

Will you be entitled to receive a lump sum when the term expires?

No

Yes

What is this amount?

Amount in  
foreign currency

 ,  ,  . 

**16 Is your pension a reversionary pension?**



A reversionary pension is one that reverts, or is payable to your partner or another person after your death.

No

Yes

Please provide the following details relating to the person who will receive the pension following your death:

**Full name**

Title:

Mr

Mrs

Miss

Ms

Other

Family name

First given name

Other given names

Date of birth

Day

Month

Year

 /  / 

Gender

Male

Female

Indeterminate

Relationship with you

Did you answer Yes at question 12?

No

Yes

What percentage of your pension will the person above receive after your death?

%

**17 Did you receive your pension following the death of your partner or another person?**

No

Yes

Please provide the following details in relation to the deceased:

**Full name**

Title:

Mr

Mrs

Miss

Ms

Other

Family name

First given name

Other given names

Date of birth

Day

Month

Year

 /  / 

Date of their death

 /  / 

TFN (if known)

  

Date they first received the pension

Day

Month

Year

 /  / 

**18 Is someone else currently entitled to a share of your pension or annuity (that is, is the pension payable in joint names)?**

No

Yes

What percentage are they entitled to?

%

## Section C: Checklist

**19 Are you currently or have you ever been subject to an audit by us on the issues raised by this private ruling request, or have you been notified of a proposed audit?**

No

Yes  Provide:

- our reference numbers
- names of our officers conducting the audit.


**20 Have you previously sought an oral or written ruling for this issue?**

No

Yes  Provide:

- our reference numbers
- dates of rulings.


**21 What income years do you want the private ruling to cover?**

(Include the start and end date/s. For example 1 July 2005 to 30 June 2006.)

**!** You must answer this question.

Day                      Month                      Year                      Day                      Month                      Year  
 /  /  to  /  /

## Section D: Declaration

Complete and sign one of the following statements that applies to you

*I declare that I am applying for my own private ruling and I certify that the information contained in this document and any attached documents is true and correct.*

Your name (Print in BLOCK LETTERS)

Your signature

Date

Day / Month / Year  
 /  /

*I declare that I am applying for a private ruling on behalf of another individual, and I:*

- *certify this document, and attached documents have been prepared in accordance with the information supplied by the individual identified on this form and, where applicable, in the attached documents*
- *have received a declaration from the individual identified on this form and, where applicable, in the attached documents, stating that the information provided in each document is true and correct, and*
- *am authorised as the agent/legal personal representative of the individual identified on this form and, where applicable, in the attached documents.*

Agent's/Legal personal representative's name (Print in BLOCK LETTERS)

Agent's/Legal personal representative's signature

Date

Day / Month / Year  
 /  /

**!** 'Agent' includes a tax agent or tax professional authorised to give this application to the Commissioner of Taxation.

'Legal personal representative' means:

- an executor or administrator of a deceased estate
- a person holding a general power of attorney, or
- a trustee of an estate of a person under a legal disability.

### Privacy

The ATO is a government agency bound by the *Privacy Act 1988* in terms of collection and handling of personal information and tax file numbers (TFNs). For further information about privacy law notices for private ruling applications, please go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

**➔** Send the completed private ruling request along with supporting documentation to  
**Australian Taxation Office**  
**PO Box 3100**  
**PENRITH NSW 2740.**