Australian Government Australian Taxation Office

# Life insurance companies taxation schedule



To be completed by:

a life insurance company or

| the head company of a consolidated group that includes |
|--|
| at least one member that is a life insurance company   |
| which derived income from the complying superannuation |
| and/or segregated exempt asset classes.                |

## When completing this formPrint clearly in BLOCK LETTERS using a black pen only

| Print clearly in BLOCK LETTERS using | a black pen only. |
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|  | Place | X | in ALL | _ applicabl | e boxes. |
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| Тах       | file  | e nui           | nb    | er (        | TFI       | N)         |       |      |          |            |      |      |                   |      |     | A     | ۹us        | stra | alia | an   | bus        | sine | ess  | nu | ımb        | er ( | AB | N)  |     |     |         |     |              |           |           |     |     |    |           |     |
|-----------|---|-----------------|-------|-------------|-----------|------------|-------|------|----------|------------|------|------|-------------------|------|-----|-------|------------|------|------|------|------------|------|------|----|------------|------|----|---|-----|-----|---------|-----|--------------|-----------|-----------|-----|-----|----|-----------|-----|
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| Nar       | ne  | ofe             | ntit  | y           |           |            |       |      |          |            | -    |      |                   |      |     | _     |            |      | -    |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| $\square$ |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         | _   |              |           |           |     |     |    |           |     |
|           |   | LUL             |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| Cor       | ita   | ct na           | ame   | э<br>       |           |            |       |      |          |            |      |      |                   |      |     |       |            |      | ][   |      |            |      |      |    |            |      |    |   |     |     |         |     | 1            |           |           |     |     |    |           |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| Day       | tim   | ne co           | nta   | ct r        | านท       | nbe        | r (in | clu  | de       | area       | a co | ode  | )                 |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| ls tl     | Is the entity a consolidated head company? No Yes |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| 1         | In  | ncon            | ne    | – s         | eg        | re         | gat   | ed   | ex       | en         | npt  | as   | set               | :s ( | SE  | EA)   |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
|           |   |                 |       |             |           |            | Orc   | lina | ry a     | and        | sta  | atut | ory i             | nco  | m   | e (c  | oth        | er t | tha  | .n p | oren       | niu  | ms)  | Α  | \$         |      |    |   |     |     |         |     |              |           |           |     |     | -  | ×         |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      | _                 |      |     |       | <b>6</b> - |      |      |      |            | - 12 |      | D  | • [        |      | ,  |   |     |     | _,<br>_ |     |              |           | ,∟<br>    |     |     |    | 80        |     |
|           |   |                 |       |             |           |            |       |      |          | Pr         | em   | lum  | 18 -              | exe  | em  | ρτ ΙΙ | Te         | Ins  | ura  | anc  | e p        | 0110 | cies | B  | <b>Þ</b> [ |      | ,  |   |     |     | _,      |     |              |           | _,_       |     |     | -  | ×         |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| 2         | Α   | sse             | SSA   | able        | e ir      | າດ         | om    | е    |          |            |      | Ord  | lina              | ry c | las | SS    |            |      |      |      |            |      |      |    |            | C    | om | ply   | ing | SL  | ibe     | era | INN          | ua        | tion      | Cla | ເຣຣ |    |           |     |
|           |   | Prem            | niun  | ns f        | rom       | ٦          |       |      |          | ı —        |      |      |                   |      |     |       | _          |      |      |      | 1          |      |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| acc       |   | nt an<br>1d tei |       |             |           |            | \$    |      |          | ,          |      |      | _,_               |      |     |       | ,∟         |      |      |      | <b>.</b> ⊳ | 0    |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
| Pre       | miı   | ums             | - 0   | the         | r life    | Э <b>г</b> | \$    |      |          |            |      |      |                   |      |     |       | Г          |      |      |      | •>         | Я    |      | E  | \$         |      |    |   |     |     | ٦       |     |              |           |           |     |     | ٦. | $\bowtie$ |     |
|           | ins   | uran            | ce    | ooli        | cies      | S 🖥        | Ψ     |      |          | ,          |      |      | _,∟               |      |     |       | ,∟         |      |      |      | ]-@        | 8    |      |    | Ψ          |      | ,  | ,∟  |     |     | _,      |     |              |           | ,_        |     |     |    | 20        |     |
| Tota      | al o  | ordina          | ary   | inco        | ome       | e F        | \$    |      |          | ļ.         |      |      | _,_               |      |     |       | ,L         |      |      |      | •D+        | 0    |      |    |            |      |    |   |     |     |         |     |              |           |           |     |     |    |           |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      | Т   | ota   | l a        | SSE  | ess  | ab   | le ir      | ncc  | ome  | G  | \$         |      |    |   |     |     |         |     |              |           |           |     |     | -  | $\bowtie$ |     |
|           |   |                 | ~ -   |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      | 1          |      |      |    | r<br>I     |      | ,  |   |     |     | _,<br>_ |     |              |           | ,∟<br>─┐┌ |     |     |    |           |     |
|           |   | I               | OF,   | A ga        | ains      | εL         | \$    |      |          | ,          |      |      | ,<br>n <b>F</b> a |      |     |       | ,∟         |      |      |      | ]•Þ        |      |      |    | \$         |      | ,  |   |     |     | ,       |     |              |           | _,_       |     |     | •  | $\bowtie$ |     |
| -         | _   |                 | _     |             |           |            |       |      |          |            |      | (11  |                   | loov | e)  |       |            |      |      |      |            |      |      |    |            |      |    |   |     | (11 | 1 G     | aL  | JUVE         | <i>=)</i> |           |     |     |    |           |     |
| 3         |   | llow            |       |             |           |            |       | ons  | <b>;</b> | ı —        |      |      |                   |      | 1   |       | _          |      |      |      | 1          |      |      |    | . 1        |      |    |   |     |     | _       |     |              |           |           |     |     | _  |           |     |
| Т         | ax  | losse           | es c  | clair       | neo       | k          | \$    |      |          | ļ,         |      |      | _,_               |      |     |       | ,L         |      |      |      | <b>.</b> ⊳ | 0    |      | Η  | \$         |      | ,  |   |     |     | _,      |     |              |           | _,_       |     |     | •  | ×         |     |
|           |   | Tota            | l all | owa<br>ucti | able      | e          | \$    |      |          |            |      |      |                   |      |     |       |            |      |      |      | <b>.</b> ⊳ | 0    |      | Κ  | \$         |      |    |   |     |     |         |     |              |           |           |     |     | -  | $\Join$   |     |
|           |   |                 |       |             |           |            |       |      | L        | ' <b>9</b> |      |      |                   |      | 1   |       | ,          |      | 1    |      | L          |      |      |    | · [        | 1    | ,  | <u>الــــــــــــــــــــــــــــــــــــ</u> |     | [   | ',      | L   |              |           |           | 1   | 1[  |    |           |     |
| 4         |   | axak            |       |             |           |            |       | los  | SS       | ı —        |      |      |                   |      | ,   |       | _          |      | , r  |      | 1          | ,    | LOSS | S  | r          | , r  |    |   |     |     | _       |     |              |           |           |     |     |    |           | LOS |
|           |   | Taxa            | BIG   | or          | om<br>los | s I        | \$    |      |          | I,L        |      |      | _,_               |      |     |       | ,L         |      |      |      | •>         | ۹/   |      | M  | \$         |      | ,  |   |     |     | _,      |     |              |           | _,[       |     |     | -  | $\bowtie$ |     |
|           |   |                 |       |             |           |            |       |      |          |            |      |      |                   |      |     |       |            |      |      |      |            |      |      |    |            |      |    |   |     | (   | (G /    | ess | s <b>K</b> ) |           |           |     |     |    |           |     |

#### 5 Transfers

6

| Transfers to complying superannuation asset pool N \$,,,,   |  |  |  |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|--|--|--|
| Transfers from complying superannuation asset pool 0 \$,,,, |  |  |  |  |  |  |  |  |  |  |  |  |
| Transfers to SEA P\$,,,,                                    |  |  |  |  |  |  |  |  |  |  |  |  |
| Transfers from SEA Q\$,,,,                                  |  |  |  |  |  |  |  |  |  |  |  |  |
| Exploration credit tax offset                               |  |  |  |  |  |  |  |  |  |  |  |  |
| Exploration credit tax offset R \$                          |  |  |  |  |  |  |  |  |  |  |  |  |

### **Taxpayer's declaration**

#### If the schedule is not lodged with the income tax return you are required to sign and date the schedule.

#### Important

Before making this declaration check to ensure that all the information required has been provided on this form, and that the information provided is true and correct in every detail. If you are in doubt about any aspect of the form, place all the facts before the ATO. The income tax law imposes heavy penalties for false or misleading statements.

#### Privacy

Taxation law authorises the ATO to collect information and disclose it to other government agencies. This includes personal information of the person authorised to sign the declaration. For information about your privacy go to **ato.gov.au/privacy** 

#### **Declaration:**

I declare that the information on this form is true and correct.

| Public officer's signature                 | _    |     |       |      |
|--|------|-----|-------|------|
|  |      | 5   |       | N.   |
|  | Date | Day | Month | Year |
| Public officer's name                      |      |     |       |      |
|  |      |     |       |      |
| Daytime contact number (include area code) |      |     |       |      |
|  |      |     |       |      |