Australian Taxation Office

www.ato.gov.au

2001 application for refund of imputation credits for individuals

For individuals who do not need to lodge a tax return.

You must read the publication *Refund of imputation credits—application and instructions for individuals* before you complete this claim. Do not use correction fluid or tape. Please print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Print one letter or number in each box. Print ☒ in appropriate boxes.

TEAR ALONG DOTTED LINE

1 Your tax file number (TFN)

See the **Privacy** note in the *Your declaration* on the next page.

If you do not have a TFN or you are unsure see page 2 in the instructions.

2 Were you an Australian resident for the whole period 1 July 2000 to 30 June 2001?

See pages 2–3 in the instructions if you are unsure.

YES ☐ If you were not an Australian resident for this whole period you cannot use this application—see pages 2–3 in the instructions for more information.

3 Your sex

Male ☐ Female ☐

4 Your name

Print your full name.

Title—for example, Mr, Mrs, Ms, Miss

Surname or family name

Given names

▶ **Has any part of your name changed since you last provided your details to us?**

NO ☐ YES ☐ ▶ Previous surname

5 Your postal address

Print the address where you want your mail sent.

Suburb or town

State Postcode Country if not Australia

▶ **Has this address changed since completing your last tax return?**

Fill in the appropriate box then read on.

NO ☐ YES ☐

6 Is your home address different from your postal address?

NO ☐ Read on.

YES ☐ Print your home address.

Suburb or town

State Postcode Country if not Australia

7 Your date of birth

Day Month Year

If you were under 18 years of age on 30 June 2001, you cannot use this application.

8 Your daytime telephone number—If we need to ask you about your application, it is quicker by telephone.

Area code

Telephone number

9 Your spouse's name

Surname or family name

Given names

10 Do you want your refund paid directly into your financial institution account?

Read page 3 in the instructions for more information.

NO ☐ Read on.

YES ☐ Complete your account details below. See page 3 in the instructions for more information.

BSB number ☐☐☐☐☐☐ Account number ☐☐☐☐☐☐☐☐☐

Account name—for example, J Q Citizen. Do not show the account type, such as cheque, savings, mortgage offset.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

11 Dividends

Pages 4–5 in the instructions includes a worksheet to help you to complete these amounts if you have more than one statement.

Show dollars and cents.

Tax file number amounts withheld from dividends **V** ☐,☐☐☐.☐☐

Unfranked amount **S** ☐,☐☐☐.00

Franked amount **T** ☐,☐☐☐.00

Imputation credit **U** ☐,☐☐☐.00

Do not show cents.

TOTAL DIVIDEND INCOME Add up all the amounts in **S**, **T** and **U**. $ ☐,☐☐☐.00

Is your application complete?

Make sure you have completed your application correctly. If there are any errors the processing of your application may be delayed.

Before you sign *Your declaration* below, check that you have:

- ✓ written your tax file number on page 1 of this application to avoid delays in processing
- ✓ filled in all your personal details on page 1
- ✓ filled in your financial institution account details on this page if you want your refund paid directly into your financial institution account
- ✓ correctly completed all of your dividend details for 2000–01.

YOUR DECLARATION

Read and sign the declaration after completing your application. Even though someone else may have helped you to complete your application you are responsible for the information provided and you must sign the declaration.

I declare that:

- all the information I have given in this application is true and correct
- I do not need to lodge a tax return and have no tax payable for the 2000–01 income year
- I have shown the total of my dividend income and imputation credits received during the 2000–01 income year AND
- I have the necessary records to support my application for a refund of dividend imputation credits.

IMPORTANT

The Australian Taxation Office (ATO) may confirm with the payer who sent you your dividend or distribution statement that the information you have provided in this application is correct. The tax law imposes heavy penalties for giving false or misleading information.

Privacy

You do not have to quote your tax file number (TFN). However, your refund will be delayed if you do not quote your TFN.

The ATO is authorised by the *Income Tax Assessment Act 1936* and the *Income Tax Assessment Act 1997* to ask for information in this application. 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, Training and Youth Affairs and the Department of Family and Community Services; law enforcement agencies such as the National Crime Authority; and other agencies such as the Child Support Agency, the Australian Bureau of Statistics and the Reserve Bank of Australia.

SIGNATURE

Date ☐☐ ☐☐ ☐☐☐☐
Day Month Year