2001 tax return for individuals

Use TaxPack 2001 to fill in this tax return. 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. Printed in appropriate boxes.

IMPORTANT: Complete your details carefully to avoid delays in processing your tax return.

Your tax file number (TFN)

Are you an Australian resident?

Your sex
Male  Female

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 completing your last tax return?

NO  YES
Previous surname

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

Is your home address different from your postal address?

NO  Read on.
YES  Print your home address.

Your date of birth
If you were under 18 years of age on 30 June 2001 you must complete item A1 on this tax return. Read page 100 in TaxPack 2001 for more information.

Day  Month  Year
Please provide your date of birth to avoid delays in the processing of your tax return.

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

Area code  Telephone number

Your spouse’s name
If you had more than one spouse during 2000–01 print the name of your latest spouse.

Surname or family name
Given names

Will you need to lodge an Australian tax return in the future?
YES  DON’T KNOW  NO

Do you want to use electronic funds transfer (EFT) this year for your tax refund or family tax benefit payment where applicable? Read page 8 in TaxPack 2001 for more information.

NO  Read on.
YES  If you used EFT last year and the account details you provided are correct, do not write them again. Otherwise complete the boxes below.

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

IN-CONFIDENCE—when completed
### Income

Pages 10–34 in **TaxPack 2001** will help you to correctly fill in the following items.

#### 1 Salary or wages

<table>
<thead>
<tr>
<th>Description</th>
<th>Tax withheld</th>
<th>Income—do not show cents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payer's Australian Business Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C</td>
</tr>
<tr>
<td></td>
<td></td>
<td>D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E</td>
</tr>
<tr>
<td></td>
<td></td>
<td>F</td>
</tr>
<tr>
<td></td>
<td></td>
<td>G</td>
</tr>
<tr>
<td></td>
<td></td>
<td>H</td>
</tr>
</tbody>
</table>

#### 2 Allowances, earnings, tips, director's fees etc.

<table>
<thead>
<tr>
<th>Amount A in lump sum payments box</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td>5% of amount B in lump sum payments box</td>
<td></td>
</tr>
</tbody>
</table>

#### 3 Lump sum payments

<table>
<thead>
<tr>
<th>Amount</th>
<th>R</th>
</tr>
</thead>
<tbody>
<tr>
<td>5% of</td>
<td>H</td>
</tr>
</tbody>
</table>

#### 4 Eligible termination payments

Taxable amount other than excessive component | I |
Excessive component | N |

#### 5 Commonwealth of Australia government allowances and payments like Newstart, youth allowance and Austudy payment

| Amount | A |

#### 6 Commonwealth of Australia government pensions and allowances

| Amount | B |

If you had a spouse during 2000–01 who also received income listed at this question in **TaxPack 2001** or an exempt pension listed on page 9 in **TaxPack 2001** complete **Spouse details—married or de facto** on pages 6–7 of this tax return.

#### 7 Other Australian pensions or annuities—including superannuation pensions

| Amount | J |

#### 8 Attributed personal services income

| Amount | O |

#### TOTAL TAX WITHHELD

For items 1 to 8 add up all the amounts in the tax withheld column.

#### 9 Total reportable fringe benefits amounts

W

#### 10 Gross interest

If you are a non-resident make sure you have printed your country of residence on page 1.

<table>
<thead>
<tr>
<th>Amount</th>
<th>L</th>
</tr>
</thead>
</table>

Tax file number amounts | M |

#### 11 Dividends

If you are a non-resident make sure you have printed your country of residence on page 1.

<table>
<thead>
<tr>
<th>Amount</th>
<th>S</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unfranked amount</td>
<td></td>
</tr>
<tr>
<td>Franked amount</td>
<td></td>
</tr>
<tr>
<td>Imputation credit</td>
<td></td>
</tr>
</tbody>
</table>

Tax file number amounts | V |

#### Only used by taxpayers completing the **2001 tax return for individuals** (supplementary section)

Transfer the amount from **TOTAL SUPPLEMENT INCOME OR LOSS** on page 11 and write it here.

#### TOTAL INCOME OR LOSS

Add up all the income amounts and deduct any loss amount in the right-hand column.

For items 1 to 8 add up all the amounts in the tax withheld column.

Make sure that you complete item M2. See pages 95–8 in **TaxPack 2001**.
Attach your payee’s tax return copy of requested payment summaries and other attachments here. Place your payment summaries on top, followed by any other attachments. Do not send in this tax return until you have attached all requested attachments.

**Deductions**

Pages 35–61 in *TaxPack 2001* will help you to correctly fill in the items below.

<table>
<thead>
<tr>
<th>CLAIM</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE</td>
</tr>
</tbody>
</table>

You must read pages 36–7 in *TaxPack 2001* if you are claiming deductions for expenses that relate to your work as an employee at items D1, D2, D3, D4 and D5.

- **D1** Work related car expenses
- **D2** Work related travel expenses
- **D3** Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses
- **D4** Work related self-education expenses
- **D5** Other work related expenses
- **D6** Interest and dividend deductions
- **D7** Gifts or donations
- **D8** Deductible amount of undeducted purchase price (UPP) of an Australian pension or annuity
- **D9** Cost of managing tax affairs

You will find information on deductible amount of UPP of a foreign pension or annuity at question **D11** in *TaxPack 2001* supplement.

**TOTAL DEDUCTIONS**

Add up all the deduction amounts items **D1** to **D9**.

**SUBTOTAL**

TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS

**Losses**

Pages 62–4 in *TaxPack 2001* will help you to correctly fill in the item below.

- **L1** Tax losses of earlier income years claimed this income year

**TAXABLE INCOME OR LOSS**

If you did not complete **L1** write the amount from **SUBTOTAL** here.

If you did complete **L1** you must read page 65 in *TaxPack 2001*.

Make sure you sign the *Taxpayer’s declaration* on page 8.

Page 3
**Tax offsets (formerly called rebates)**

Pages 72–88 in *TaxPack 2001* will help you to correctly claim your tax offsets.

**T1 Spouse (without dependent child or student), child-housekeeper or housekeeper**

To claim the spouse tax offset you must also complete *Spouse details—married or de facto* on pages 6–7. Separate net income of your spouse must be shown on page 7, not here.

**T2 Low income aged person**

If you had a spouse during 2000–01 you must also complete *Spouse details—married or de facto* on pages 6–7.

**T3 Superannuation contributions, annuity and pension**

<table>
<thead>
<tr>
<th>Type of cover</th>
<th>Amount of refundable tax offset—not contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>T</strong></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**T4 30% private health insurance**

You must complete *Private health insurance policy details* below.

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**Only used by taxpayers completing the 2001 tax return for individuals (supplementary section)**

Transfer the amount from *TOTAL SUPPLEMENT TAX OFFSETS* on page 12 and write it here.

**TOTAL TAX OFFSETS**

Add up all the tax offset amounts items **T1 to T**. $0.00

The ATO will work out any tax offset for low income. Read page 65 in *TaxPack 2001* for more information.

**Private health insurance policy details**

Page 89 in *TaxPack 2001* will help you to correctly fill in your details.

You must provide the details for each policy if items **T4** or **M2** asked you to complete this section.

<table>
<thead>
<tr>
<th>Health fund ID</th>
<th>Membership number</th>
<th>Type of cover</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>C</td>
<td></td>
</tr>
</tbody>
</table>

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Medicare levy related items

**M1 Medicare levy reduction or exemption**

**Reduction based on family income**
- Number of dependent children and students  
  - [Y] [ ]

**Exemption categories**
- Full 1.5% levy exemption—number of days  
  - [V] [ ]
  - [ ]
- Half 1.5% levy exemption—number of days  
  - [W] [ ]

If you have completed item M1 and had a spouse during 2000–01 you must also complete Spouse details—married or de facto on pages 6–7.

**M2 Medicare levy surcharge (MLS)**

**STOP THIS ITEM IS COMPULSORY FOR ALL TAXPAYERS.**

If you do not complete this item you may be charged the full Medicare levy surcharge.

To help you determine if you have to pay the surcharge read pages 95–8 in TaxPack 2001.

For the whole period 1 July 2000 to 30 June 2001 were you and all of your dependants (including your spouse)—if you had any—covered by private patient hospital cover?

- **YES** [ ] You must complete Private health insurance policy details on page 4. You have now finished this item.
- **NO** [ ] Read on.

For the whole of 2000–01 were you:
- a single person—without a dependent child or children—and your taxable income for MLS purposes (including your total reportable fringe benefits amounts) was $50 000 or less OR
- a member of a family—which may consist of a couple (married or de facto) with or without a dependent child or children; or a sole parent with a dependent child or children—and the combined taxable income for MLS purposes (including the total reportable fringe benefits amounts) of you and your spouse (if you had one) was $100 000 (plus $1500 for each dependent child after the first) or less?

- **NO** [ ] You may have to pay the surcharge—read pages 95–8 in TaxPack 2001.
- **YES** [ ] You do not have to pay the surcharge—you must write ‘365’ at A.

You must write the following at A:
- ‘0’ when you have to pay the surcharge for the whole period 1 July 2000 to 30 June 2001
- ‘365’ when you do NOT have to pay the surcharge for the whole period 1 July 2000 to 30 June 2001
- the number of days you do NOT have to pay the surcharge for part of the period 1 July 2000 to 30 June 2001.

If you had a spouse during 2000–01 complete Spouse details—married or de facto on pages 6–7.

If you were covered by private patient hospital cover at any time during 2000–01 you must complete Private health insurance policy details—see page 89 in TaxPack 2001.
Adjustments  Pages 99–104 in TaxPack 2001 will help you to correctly fill in these items.

### A1 Under 18 excepted net income

If you were under 18 years of age on 30 June 2001 you must complete this item. Read page 100 in TaxPack 2001 for more information.

### A2 Part-year tax-free threshold

<table>
<thead>
<tr>
<th>Date</th>
<th>Month</th>
<th>Year</th>
</tr>
</thead>
</table>

Months eligible for threshold

<table>
<thead>
<tr>
<th>Income while a full-time student</th>
</tr>
</thead>
</table>

You must read pages 101–2 in TaxPack 2001 to complete this item.

### A3 Amount on which family trust distribution tax has been paid

If a trust, partnership or company made a distribution to you on which family trust distribution tax has been paid, you must read page 103 in TaxPack 2001.

### A4 Amount on which ultimate beneficiary non-disclosure tax was payable

You must read page 104 in TaxPack 2001 to complete this item.

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**Spouse details—married or de facto**

If you completed any of the items listed below you may need to complete Spouse details—married or de facto. We need the information included in this section to accurately assess your taxation obligations.

**Did you complete any of the following items?**

1. **Commonwealth of Australia government pensions and allowances**
   - and your spouse also received income listed at this question in TaxPack 2001 or an exempt pension listed on page 9 in TaxPack 2001.
2. **spouse (without dependent child or student) tax offset**
3. **low income aged person tax offset**
4. **Medicare levy reduction or exemption**
5. **Medicare levy surcharge**
6. **superannuation contributions on behalf of your spouse (supplementary section)**

**NO** You do not need to complete this section. Go to page 8.

**YES** You need to complete this section. Complete the information required below then go to page 7.

**Spouse's date of birth**

| Day | Month | Year |

**Did you have a spouse for the full year—1 July 2000 to 30 June 2001?**

**NO**

**YES**

**From**

| Day | Month | Year |

**To**

| Day | Month | Year |
You only need to complete spouse's 2000–01 taxable income if:
- you had a spouse on 30 June 2001 AND you completed item M1 (Y only)
- you had a spouse for all of 2000–01 AND you printed X in the NO box at Item M2
- you had a spouse for any part of the year AND you completed one or more of items 6, T2, T5 and M1 (V or W).

For any of the following that you are required to complete, if the amount is zero, write '0'.

Spouse's 2000–01 taxable income

If you completed item T2 or M2 show your spouse's share of trust income on which the trustee is assessed under section 98 and which has not been included in spouse's taxable income.

If you had a spouse for all of 2000–01 and you printed X in the NO box at Item M2, show the distributions to your spouse on which family trust distribution tax has been paid which your spouse would have had to show as assessable income if the tax had not been paid.

Show your spouse's total reportable fringe benefits amounts if you had a spouse for all of 2000–01 and you printed X in the NO box at Item M2 or you had a spouse at any time during 2000–01 and you completed item T5.

If you completed item 6, show the amount of Commonwealth of Australia government pensions and allowances (listed on page 22 in TaxPack 2001) that your spouse received in 2000–01.

If you completed item 6 show the amount of any exempt pension income (listed on page 9 in TaxPack 2001) that your spouse received in 2000–01.

TAXPAYER’S DECLARATION

I declare that:
• all the information I have given in this tax return, including any attachments, is true and correct
• I have shown all my income—including net capital gains—for tax purposes for 2000–01
• I have completed and attached the supplementary section, schedules and other attachments—as appropriate—that TaxPack 2001 told me to provide
• I have completed item M2—Medicare levy surcharge
• I have the necessary receipts and/or other records—or expect to obtain the necessary written evidence within a reasonable time of lodging this tax return—to support my claims for deductions and tax offsets.

IMPORTANT

The tax law imposes heavy penalties for giving false or misleading information.

SIGNATURE

Date

Day  Month  Year

Use the pre-addressed envelope provided with TaxPack 2001 to lodge your tax return.


Page 8
IN-CONFIDENCE—when completed