



Deferring your compulsory repayment or overseas levy

Completing your application

- Refer to the [Deferring your compulsory repayment or overseas levy](#) instructions to help you complete this application.
- Make sure you sign the declaration before you lodge your application.
- Make a copy of your application for your own records.

If you are filling in this form on screen:

- complete and print your application in one session (data you entered cannot be saved when you close the file).

If you are filling in this form by hand:

- Print clearly in BLOCK LETTERS using a black pen only.
- Use BLOCK LETTERS and print one character per box.
- Place **X** in ALL applicable boxes.

! Do you have any overdue tax returns? If you have not lodged all your tax returns or non-resident foreign income forms, you should get these up to date now so we can consider your application.

If you believe you are not required to lodge, you can complete a *Non-lodgment advice* online. See the instructions for more details.

Section A: Personal details

1 Tax file number (TFN)

! We are authorised by the *Taxation Administration Act 1953* to collect your TFN. You are not required by law to provide your TFN. However, quoting your TFN reduces the risk of administrative errors that could delay the processing of your application.

2 Full name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

3 Date of birth / /

4 Postal address

Street address

Suburb/town/locality

State/territory

(Australia only)

Postcode

(Australia only)

Country if other than Australia

5 Contact numbers

If we need to ask you about your application or require further information, it is quicker by phone.

Home phone number (including area code)

Work phone number (including area code)

Mobile phone number

International phone number (including full international code)

Preferred contact time (include time zone)

AM PM

Email address

Section D: Household income and expenditure

 Complete all amounts in Australian dollars.

9 Do you have any dependents (or other people) who rely on you for financial support?

No

Yes Provide details below

	Dependent(s)	Years old	Dependent's fortnightly income (for example, Austudy, wages)
1			\$
2			\$
3			\$
4			\$

10 Are you currently employed?

No When did you stop working? / /

Why did you stop working?

Did you receive an eligible termination payment (ETP) or redundancy package when you stopped working?

No Yes Provide amount and details Amount \$

Details

Yes

11 Is your spouse or partner currently employed?

No When did they stop working? / /

Why did they stop working?

Yes

12 Income and expenses

Your fortnightly income

	Applicant	Spouse or partner
Salary or wages including salary sacrificing amount (before tax)	\$	\$
Overtime	\$	\$
Commissions from sales	\$	\$
Australian Government payment	\$	\$
Overseas government payment	\$	\$
Family tax benefit	\$	\$
Child support	\$	\$
Business/partnership income (after expenses)	\$	\$
Regular estate distributions (for example, partnership, family trust, deceased estate)	\$	\$
Superannuation income	\$	\$
Net income from rental property	\$	\$
Board and other contributions to household income	\$	\$
Dividends and interest	\$	\$
Insurance income (for example, worker's compensation income protection insurance)	\$	\$
Any other sources of regular fortnightly income	\$	\$
Total before tax	\$	\$
Total after tax	\$	\$
Total net income for you and your spouse or partner		\$

Your combined fortnightly expenses

We may need proof of expenditure.

Mortgage Rent Board \$

Household


Groceries	\$
Repairs and maintenance	\$
Electricity and gas	\$
Telephone (including mobile)	\$
Internet, pay TV	\$
Water, council rates	\$
Insurance	\$

Vehicle

Registration and insurance	\$
Repairs and maintenance	\$
Fuel, petrol and oil	\$
Repayments or leasing charges	\$

Additional

Fares	\$
School fees and other educational expenses	\$
Personal/health insurance	\$
Personal superannuation contributions (other than payer deductions)	\$
Medical, dental and pharmacy	\$
Child support or maintenance	\$
Child care	\$
Hire purchase repayments	\$
Personal loan repayments, credit card repayments (total) – exclude payments already listed	\$
Clothing	\$
Entertainment	\$
Other (please specify)	\$
Total	\$

 Refer to instructions for more detailed information.

Section E: Assets and liabilities

13 Have you acquired or disposed of any assets in the last two years?

No Yes Provide details below

Assets acquired	Date acquired			Value
	Day	Month	Year	
	/	/		\$
	/	/		\$
	/	/		\$
	/	/		\$
	/	/		\$

Assets disposed	Date disposed			Profit/Loss
	Day	Month	Year	
	/	/		\$
	/	/		\$
	/	/		\$

How were the funds from the disposed assets used?

14 Minimum fortnightly repayment for liabilities

List mortgage and personal loans	Amount borrowed	Balance owing	Minimum fortnightly repayment
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Credit card debts	Credit limit	Balance owing	Minimum fortnightly repayment
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

[▶](#) Refer to instructions for more detailed information.

15 What is the estimated value of household furniture and personal effects owned by you or jointly owned with your spouse?

Provide total market value not replacement value. \$. ~~X~~

16 List accounts held at banks, credit unions, building societies, cooperative societies or other financial institutions, include accounts held in joint names and accounts held under other names.

Financial organisation	Name of account holder	Balance
		\$
		\$
		\$
		\$
		\$

Section F: Appointment of a representative

I hereby authorise the person listed below to deal with the ATO on my behalf on all matters relating to my application.

Full name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Date of birth

Day / Month / Year

Business hours phone number (including area code)

Mobile phone number

International phone number (including full international code)

Representative's signature (only required if you are sending your application by post)

Date

Day / Month / Year

Section G: Declaration

Privacy

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For further information about your privacy go to ato.gov.au/privacy

Penalties

 You should be aware that penalties may be imposed for giving false or misleading information.

I declare that the information given on this application, including any attachments, is accurate and complete.

Sign below only if you are sending by post

Date

Day / Month / Year

Lodging your application

You can lodge this form by either:

- Mail to
Australian Taxation Office
PO Box 1032
ALBURY NSW 2640
- Fax to 1300 130 900
- Click the **Submit by email** button above
- Email to HELA@ato.gov.au

If you have additional documentation to provide, include it when submitting this form. If you click **Submit by email**, you can attach the information to the email that will be generated.

You should be aware the internet is not always a secure environment. By pressing submit, this form will be sent to the ATO via email. We don't control the path of inbound/outbound emails so the privacy of personal information sent by email can't be guaranteed. Instead you may wish to print and mail or fax the request to the above address.

Ticking this box confirms acknowledgement that unencrypted email sent via the internet is an unsecure channel and that you agree for us to reply to your message by email in relation to this matter. By communicating with us via email, there is a risk that messages could be accessed by an unauthorised third party.

 Make a copy of your application for your own records before you send it.