



Request for amendment of income tax return for individuals

Complete this form to request an amendment to your tax return.
Use a separate form for each financial year.

HOW TO COMPLETE THIS FORM

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

➤ MORE INFORMATION

If you need more information about amendment requests, you can:

- visit our website at ato.gov.au
- phone **13 28 61**.

1 What is your tax file number? (TFN)

➤ See privacy note on page 4 of this form.

2 Full name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given name

3 Has any part of your name changed since completing your last tax return?

No Yes

➤ To find out how to update your name on our records go to ato.gov.au/updatedetails or phone us on **13 28 61** before completing this form.

4 What is your date of birth?

Day Month Year

 / /

5 Has your postal address changed since you completed your last tax return?

No Yes What is your current postal address?

Street number and name

Suburb/town

State/territory

Postcode

Country, if other than Australia

6 Your contact details

Mobile number

Daytime phone number (if different from your mobile number)

Your email address

We may use your contact details to:

- advise you of tax return lodgment options
- correspond with you about your tax and superannuation affairs
- issue notices to you
- conduct research and marketing.

7 Electronic funds transfer (EFT)

We need your financial institution details to pay any refund owing to you, even if you have provided them to us previously. EFT is the fastest, most secure way for us to make a payment directly into your nominated bank account.

BSB code (include all six numbers)

Account number

Full account name

8 Why are you requesting the amendment?

You must explain why you made the mistake or why you are requesting the amendment and include specific details of what is being adjusted. We may use this information to assess or reduce any penalties or interest charges that might apply.

9 What is the year shown on the tax return you want to amend? For example 2014

! Use a separate form for each financial year

10 What information do you want to amend?

Amendment 1

Question number from tax return (if applicable) Alphabetical label on tax return

Label description (as examples, salary or wages, work related car expenses)

Amount shown on your original tax return or previous amendment \$,. New amount \$,.

Net adjustment (+ or -) \$,. Claim type code letter (if required) **➤** Refer to *Individual tax return instructions* or *Taxpack* for code letter

Amendment 2

Question number from tax return (if applicable) Alphabetical label on tax return

Label description (as examples, salary or wages, work related car expenses)

Amount shown on your original tax return or previous amendment \$,. New amount \$,.

Net adjustment (+ or -) \$,. Claim type code letter (if required) **➤** Refer to *Individual tax return instructions* or *Taxpack* for code letter

Amendment 3

Question number from tax return (if applicable) Alphabetical label on tax return

Label description (as examples, salary or wages, work related car expenses)

Amount shown on your original tax return or previous amendment \$,. New amount \$,.

Net adjustment (+ or -) \$,. Claim type code letter (if required) **➤** Refer to *Individual tax return instructions* or *Taxpack* for code letter

Amendment 4

Question number from tax return (if applicable) Alphabetical label on tax return

Label description (as examples, salary or wages, work related car expenses)

Amount shown on your original tax return or previous amendment \$,. New amount \$,.

Net adjustment (+ or -) \$,. Claim type code letter (if required) **➤** Refer to *Individual tax return instructions* or *Taxpack* for code letter

Amendment 5

Question number from tax return (if applicable) Alphabetical label on tax return

Label description (as examples, salary or wages, work related car expenses)

Amount shown on your original tax return or previous amendment \$,. New amount \$,.

Net adjustment (+ or -) \$,. Claim type code letter (if required) **➤** Refer to *Individual tax return instructions* or *Taxpack* for code letter

11 Are you required to provide additional information?

(Refer to *Individual tax return instructions* for more information. This may include, but is not limited to, details of payment summaries, eligible termination payment schedules, spouse, dependents, income tests or relevant information about any other labels that were not completed in your original tax return but are now required).

No Yes Provide details below

Checklist

- Is the request for amendment within the appropriate period of review time frame?
You can find information on periods of review on our website ato.gov.au
- If you want to change your income or deduction details, have you attached any additional documentation showing the correct details?
- If you are claiming a tax offset for spouse, pensioner, senior Australian, superannuation contribution on behalf of your spouse, parent, spouse's parent or invalid relative, or dependent (invalid and carer), have you attached details required such as your spouse/dependents details, as set out on your tax return and in accordance with the Individual tax return instructions?
- If you are claiming a Medicare levy reduction or exemption, have you attached full details about your spouse as set out on your tax return?
- If you are claiming an exemption from the Medicare levy surcharge, have you provided your private health insurance policy details, OR if you do not have any private health insurance, have you attached full details about your spouse as set out on your tax return?
- If you are claiming a tax offset for superannuation contributions paid on behalf of your spouse, have you attached full details about your spouse as set out on your tax return?
- If you are amending to include a distribution from a managed fund trust, you need to provide the components of the distribution, for example franked amount and interest.
- If you are including a lump sum payment in arrears, you need to provide the income break up for each year.
- If you have any further information to tell us, have you provided details at question **11**?
- Have you attached any documentation that may be required to verify your amendment?
For example, an amended PAYG summary or medical exemption certificate.
- Have you read, completed, signed and dated the declaration at the end of this request for amendment?

Declaration

Before you sign this form

Check that you have provided true and correct information.

Penalties

Penalties may be imposed for giving false or misleading information.

Privacy

We are authorised by the *Taxation Administration Act 1953* to request your TFN. We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However if you do not provide your TFN, your assessment may be delayed.

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

I declare that:

- *the information I have given in this amendment form is true and correct, including any attachments*
- *I have the necessary receipts and/or other records to support my claims for amendment*
- *I have obtained the consent of my spouse to quote their TFN where this is given to support a claim for family tax assistance.*

Signature

Date / /

How to lodge your form

Keep a copy of this form and any supporting documents for your own records.

Mail the original form and supporting documents to:

Australian Taxation Office
PO Box 3004
PENRITH NSW 2740