



2002 application for refund of imputation credits for individuals

1 July 2001 to 30 June 2002

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 application. Please print neatly in **BLOCK LETTERS** with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box. Print **X** in appropriate boxes.

www.ato.gov.au

1 Your tax file number (TFN)

See the **Privacy** note in *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 2001 to 30 June 2002?

See page 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 page 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

If you printed **X** in the **YES** box, see page 3 in the instructions if lodging by telephone.

5 Your postal address

Print the address where you want your mail sent.

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

Fill in the appropriate box then read on.

Suburb or town

State

Postcode

Country if not Australia

NO

YES

If you printed **X** in the **YES** box, see page 3 in the instructions if lodging by telephone.

6 Is your home address different from your postal address?

NO Read on.

YES Print your home address.

If you printed **X** in the **YES** box, see page 3 in the instructions if lodging by telephone.

Suburb or town

State

Postcode

Country if not Australia

7 Your date of birth

Day Month Year

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?

See page 3 in the instructions for more information.

NO Read on.

YES If you used electronic funds transfer last year and the account details are the same do not write them again. Otherwise complete the account details.

If you change or update your account details, you will not be able to lodge your application by telephone unless the Australian Taxation Office (ATO) has already recorded the changes.

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 include a worksheet to help you to complete these amounts if you have more than one statement.

Unfranked amount **S**

Franked amount **T**

Imputation credit **U**

Show dollars and cents.

Tax file number amounts withheld from dividends **V**

Do not show cents.

TOTAL DIVIDEND INCOME

Add up all the amounts in **S**, **T** and **U**. **\$**



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 TFN 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 2001–02.

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 on this application is true and correct
- I do not need to lodge a tax return and have no tax payable for the 2001–02 income year
- I have shown the total of my dividend income and imputation credits received during the 2001–02 income year AND
- I have the necessary records to support my application for a refund of dividend imputation credits.

IMPORTANT

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

SIGNATURE

Privacy

You do not have to quote your 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 on 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, Science and Training 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.

Only complete receipt details if lodging by telephone.

Receipt number

Date
Day Month Year