



2004 tax return for individuals

1 July 2003 to 30 June 2004

Use *TaxPack 2004* to fill in this tax return. 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. Complete your details carefully to avoid delays in processing your tax return.

Your tax file number (TFN)

See the **Privacy** note in the *Taxpayer's declaration* on page 8 of your tax return.

Are you an Australian resident?

YES NO

See page 10 in *TaxPack 2004*.

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.

Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO YES

Suburb or town

State Postcode Country if not Australia

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

Your date of birth

If you were under 18 years of age on 30 June 2004 you must complete item **A1** on page 6 of your tax return. Read page 102 in *TaxPack 2004* for more information.

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Your telephone number during business hours—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 2003–04 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 FINAL

Do you want to use electronic funds transfer (EFT) this year for your tax refund or family tax benefit payment where applicable? Read pages 10–11 in *TaxPack 2004* 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 BSB number, account number and account name below.

BSB number Account number

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

1 Salary or wages Your main salary and wage occupation Description

Payer's Australian business number

Tax withheld—do not show cents -00

Income—do not show cents **C** .00

D .00

E .00

F .00

G .00

2 Allowances, earnings, tips, director's fees etc. -00 **K** .00

3 Lump sum payments

Amount A in lump sum payments box **R** .00 **TYPE**

5% of amount B in lump sum payments box **H** .00

4 Eligible termination payments (ETP)
Attach the 'Payee's Tax Return Copy' of your ETP payment summary or letters to page 3 of your tax return.

Taxable amount other than excessive component **I** .00

Excessive component **N** .00

-00

5 Commonwealth of Australia government allowances and payments like Newstart, youth allowance and austry payment -00 **A** .00

6 Commonwealth of Australia government pensions and allowances -00 **B** .00

7 Other Australian pensions or annuities—including superannuation pensions

Type

-00 **J** .00

8 Attributed personal services income -00 **O** .00

TOTAL TAX WITHHELD \$ -00 ← For items 1 to 8 add up all the amounts in the tax withheld column.

9 Total reportable fringe benefits amounts **W** .00

10 Gross interest If you are a non-resident make sure you have printed your country of residence on page 1 of your tax return. Gross interest **L** .00

Tax file number amounts withheld from gross interest **M** .00

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

Unfranked amount **S** .00

Franked amount **T** .00

Tax file number amounts withheld from dividends **V** .00

Franking credit **U** .00

Only used by taxpayers completing the 2004 tax return for individuals (supplementary section)

I Transfer the amount from **TOTAL SUPPLEMENT INCOME OR LOSS** on page 11 and write it here. \$.00 **LOSS**

TOTAL INCOME OR LOSS Add up all the income amounts and deduct any loss amount in the right-hand column. \$.00 **LOSS**

M1 Medicare levy reduction or exemption



NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read pages 94–7 in *TaxPack 2004* to work out if you are eligible to claim.

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**

CLAIM
TYPE

If you have completed item **M1** and had a spouse during 2003–04 you must also complete **Spouse details—married or de facto** on pages 6–7 of your tax return.

M2 Medicare levy surcharge (MLS)

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 98–101 in *TaxPack 2004*.

For the **whole** period 1 July 2003 to 30 June 2004 were **you** and **all** of your dependants (including your spouse)—if you had any—covered by private patient HOSPITAL cover?

E

YES

You **must** complete **Private health insurance policy details** on page 4 of your tax return. You have now finished this item.

NO

Read on.

For the whole of 2003–04 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 \$1,500 for each dependent child after the first) or less?

NO

You may have to pay the surcharge—read pages 98–101 in *TaxPack 2004*.

YES

You do not have to pay the surcharge—you must write **'366'** at **A**.

You must write the following at **A**:

- **'0'** when you have to pay the surcharge for the whole period 1 July 2003 to 30 June 2004
- **'366'** when you do NOT have to pay the surcharge for the whole period 1 July 2003 to 30 June 2004
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 2003 to 30 June 2004.

Number of days you do NOT have to pay the surcharge **A**

Number of dependent children **D**

If you had a spouse during 2003–04 complete **Spouse details—married or de facto** on pages 6–7 of your tax return.

If you were covered by private patient hospital cover at any time during 2003–04 you **must** complete **Private health insurance policy details**—see page 92 in *TaxPack 2004*.

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

Consent to use part or all of your 2004 tax refund to repay your spouse's family tax benefit (FTB) overpayment

Only complete the details below if:

- you were the spouse of an FTB claimant on 30 June 2004 and your income was taken into account in their claim—check with your spouse—AND
- your spouse has given you authority to quote on your tax return their customer reference number (CRN). If your spouse does not know their CRN they can contact the Family Assistance Office, AND
- your spouse expects to have an FTB overpayment for 2004, AND
- you expect to receive a tax refund for 2004, AND
- you consent to use part or all of your tax refund to repay your spouse's FTB overpayment.

Note: An FTB overpayment can only be raised after reconciliation has been completed. If an FTB overpayment is raised after your refund has been sent to you the Tax Office will not be able to use your refund to repay the FTB overpayment.

Spouse's CRN

Spouse's sex Male Female

Spouse's name Surname or family name

Print full name. Given names

Spouse's date of birth

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

I consent to the Tax Office using part or all of my 2003–04 tax refund to repay the 2004 FTB overpayment of my spouse, whose details I have provided above. I have obtained my spouse's permission to quote their CRN.

Your signature for FTB purposes only

Date

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TAXPAYER'S DECLARATION All taxpayers must sign and date the declaration below.

Read and answer the questions below before you sign the *Taxpayer's declaration*.

1 Are you required to complete any of the items in the 2004 tax return for individuals (supplementary section)—pages 9–12? Read page 7 in TaxPack 2004 to find out.

NO Go to question 2. **YES** Attach pages 9–12 to this page.

2 Has TaxPack asked you to attach the following?

- a. any attachments relating to specific questions—to page 3 of your tax return **NO** **YES**
- b. 2004 business and professional items schedule for individuals—to page 3 of your tax return **NO** **YES**

These attachments are in addition to your payment summaries and other requested attachments which you must attach to your tax return.

Privacy

It is not an offence not to quote your tax file number (TFN). However, your assessment will be delayed if you do not quote your TFN.

The Australian Taxation Office (ATO) is authorised by the *Income Tax Assessment Act 1936*, the *Income Tax Assessment Act 1997* and the *A New Tax System (Family Assistance) (Administration) Act 1999* to ask for information on this tax return. 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.

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 2003–04
- I have completed and attached the supplementary section, schedules and other attachments—as appropriate—that *TaxPack 2004* 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
- I understand the ATO has the right to review my tax return and, for a period of up to 6 years, to issue me with a revised assessment if a review shows any inaccuracies in income or entitlements that change my assessment.

IMPORTANT

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

**FOR YOUR TAX RETURN TO BE VALID
YOU MUST SIGN BELOW.**

Date

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use the pre-addressed envelope provided with *TaxPack 2004* to lodge your tax return.
For more information, read page 106 in *TaxPack 2004*.