Australian Government
Australian Taxation Office

Short tax return for individuals 2009

1 July 2008 to 30 June 2009

Use the *Short tax return instructions 2009* to fill in this tax return.

84160609

WHEN COMPLETING THIS TAX RETURN

- Print clearly, using a black pen only.
- Use BLOCK LETTERS and print one character per box. S M I T H S T
- Place X in ALL applicable boxes.
- Do not use correction fluid or tape.

YOU CAN LODGE YOUR SHORT TAX RETURN BY PHONE OR MAIL.
By phone – **13 28 65**
By mail – **PO Box 9845 in your capital city**
For more information, see pages 3–4 of the loose leaf cover.

Section A: **Personal information**

1 Are you eligible to use the short tax return? (See pages 1–2 of the loose leaf cover.) **Yes** ☐ **No** ☐ See page 2 of the loose leaf cover for other ways to prepare your tax return.

2 Your tax file number (TFN) (See the privacy information on page 55 of the instructions.) TF

3 Are you an Australian resident? (See page 12 of the instructions.) **Yes** ☐ **No** ☐ You cannot use the short tax return. RE

4 Your sex Male ☐ Female ☐ SX

5 Your full name NM

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family name

If lodging by phone and any of these details have changed, see page 12 of the instructions.

First given name

Other given names

Has any part of your name **changed** since you last notified the Tax Office?

No ☐ **Yes** ☐ Your previous family name

6 Your postal address Print the address where you want your mail sent. PA

Suburb/town/locality

State/territory

Postcode PC

Country if not Australia

If lodging by phone and any of these details have changed, see page 12 of the instructions.

Has any part of your address **changed** since you last notified the Tax Office? **No** ☐ **Yes** ☐

7 Is your home address different from your postal address? **No** ☐ Go to Question **8**. **Yes** ☐ Print your home address. HA

Suburb/town/locality

State/territory

Postcode

Country if not Australia

8 Your date of birth Day / Month / Year DB

9 Your daytime phone number PN

10 If you had a spouse at any time during 2008–09, write your spouse's name (See page 13 of the instructions.)

Family name SN

First given name

Other given names

11 **Will you need to lodge an Australian tax return in the future?** Yes ☐ Don't know ☐ No ☐ This is my final tax return. FN

12 **It's faster and simpler to have your refund paid directly to your financial institution account.**
Do you want your refund paid directly into your financial institution account? (See page 12 of the instructions.)

Yes ☐ Fill in the BSB number, account number and name below. No ☐ Your refund will be paid by cheque to your postal address.

BSB number (Include all six digits.) Account number EF

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

Section B: **Income**

You will need to refer to the instructions to answer these questions correctly.
If a question does not apply to you, leave the answer space blank.

13 **Main salary and wage occupation**
(See page 13 of the instructions.)

14 **Salary and wages** (See page 13–4 of the instructions.)

Employer's Australian business number (ABN)	Tax withheld Do not show cents	Income Do not show cents	
	$	C $	1
	$	D $	1
	$	E $	1
	$	F $	1
	$	G $	1

15 **Employment allowances you received** (See pages 14–5 of the instructions.) $ K $ 2

16 **Newstart, youth allowance, austudy payment and other such Australian Government payments** (See list on pages 15–6 of the instructions.) $ A $ 5

17 **Age pension, age service pension, carer payment and other such Australian Government payments** (See list on pages 16–7 of the instructions.) $ B $ 6

You may be entitled to a tax offset and may need to complete Questions **34** and **35**. See pages 29–30 and 31 of the instructions to determine your eligibility.

18 **Australian annuities and superannuation income streams** (See pages 17–9 of the instructions.) $

Taxable component Taxed element J $ 7

Untaxed element N $ 7

19 **TOTAL TAX WITHHELD** Add up all the amounts in the 'Tax withheld' column. $ TX

20 **Reportable fringe benefits** (See pages 19–20 of the instructions.) W $ 10

21 **Interest** (See page 20 of the instructions.) L $ 11

22 **Dividends from shares** (See page 21 of the instructions.)

Unfranked amounts S $ 12

Franked amounts T $ 12

Franking credits U $ 12

23 **Small payments you received for your services** (totalling less than $5,000) (See pages 21–2 of the instructions.) V $ 24 I

24 **TOTAL INCOME** Add up all the amounts in the 'Income' column. $ TI

IN-CONFIDENCE – when completed

Place your attachments here.

Section C: **Deductions**

Do not show cents

25 Work-related car expenses (See pages 22–3 of the instructions.)	A	$, .00	S Code letter	D1
26 Work-related clothing expenses (See pages 23–4 of the instructions.)	C	$, .00		D3
27 Other work-related expenses (See pages 24–5 of the instructions.)	E	$, .00		D5
28 Bank account fees (See page 26 of the instructions.)	I	$, .00		D7
29 Gifts and donations of money (See pages 26–7 of the instructions.)	J	$, .00		D8
30 Cost of managing your tax affairs (See pages 27–8 of the instructions.)	M	$, .00		D9
31 TOTAL DEDUCTIONS Add up the deduction amounts.		$, , .00		TD
32 TAXABLE INCOME Total income (Question **24**) minus total deductions (Question **31**)		$, , .00		TT

Section D: **Tax offsets**

Do not show cents

33 Dependent spouse, no dependent children (See pages 28–9 of the instructions.)		P	$, .00	T1
34 Senior Australians (See pages 29–30 of the instructions.)	Tax offset code	N		T2
	Veteran code	Y		
35 Pensioner offset (See page 31 of the instructions.)	Tax offset code	O		T3
If you have completed Question **34** do not complete this question.	Veteran code	T		
36 Australian superannuation income stream (See pages 32–3 of the instructions.)		S	$, .00	T4
37 Private health insurance (See pages 33–4 of the instructions.)		G	$, .00	T5
38 Zone (remote area) (See pages 35–9 of the instructions.)		R	$, .00	T9 T
39 Ongoing baby bonus claim (See pages 40–1 of the instructions.)	Number of eligible days / Code	H		T7
40 TOTAL TAX OFFSETS Add up the tax offset amounts.			$, .00	TO

Please read page 42 of the instructions before answering the following questions.

Section E: **Medicare levy**

41 Medicare levy reduction (See pages 42–3 of the instructions.)	Number of dependent children under the income limit	Y		M1
42 Medicare levy exemption (See pages 43–5 of the instructions.)	FULL exemption – number of days	V	Code letter	M1
	HALF exemption – number of days	W		M1

43 Medicare levy surcharge

You must answer this question (See pages 46–8 of the instructions.) M2

Did you and **all** your dependants (including your spouse) have an appropriate level of private patient **hospital cover** for all of 2008–09?

Read the note at step 1 on page 46 of the instructions before answering this question.

E Yes → You do not have to pay the surcharge. M2

E No → Number of days you do **not** have to pay the surcharge A M2

Number of dependent children D

Section F: **Private health insurance policy details**

44 Private health insurance policy details
(See page 48 of the instructions.)

If you had private health insurance of any type at any time in 2008–09 **you must answer this question.**

Health insurer ID | Membership number | Type of cover

B **C** PH

B **C** PH

Section G: **Adjustment**

45 Under 18
(See page 49 of the instructions.)

Income to be taxed at normal rates (using the calculation on page 49 of the instructions) **J** $, .

Age code A1

If you were aged under 18 years on 30 June 2009 **you must answer this question.**

Section H: **Spouse details – married or de facto**

If you did not have a spouse at any time in 2008–09, go straight to Question **52**.

If you had a spouse at any time in 2008–09:
- check that you have answered Question **10** on page 1
- check Questions **46** to **51** in the instructions to see if you have to answer them.

46 Your spouse's details
(See page 50 of the instructions.)

Your spouse's date of birth **K** Day / Month / Year SD

Your spouse's sex Male
Female

Did you have a spouse for **all** of 2008–09? **L** **No** **Yes**

If you did **not** have a spouse for the full year – write the dates you had a spouse between 1 July 2008 and 30 June 2009.

From **M** Day / Month / Year

To **N** / /

If your answer is zero to a question which you are required to answer below, do not leave it blank – write **0**.

47 Your spouse's 2008–09 taxable income
(See page 50 of the instructions.)
O $, , . SI

48 Your spouse's share of trust income
(See page 51 of the instructions.)
T $, .

49 Your spouse's income from family trust distribution
(See page 51 of the instructions.)
U $, .

Your spouse's reportable fringe benefits amounts
(See page 51 of the instructions.)
S $, .

50 Age pension and other such government payments paid to your spouse in 2008–09 (See pages 51–2 of the instructions.)
P $, .

Exempt pension income your spouse received in 2008–09
(See pages 51–2 of the instructions.)
Q $, .

51 Your spouse's separate net income
(See page 52 of the instructions.)
R $, .

Section I: **DECLARATION**

The tax law imposes heavy penalties for giving false or misleading information. See the privacy information on page 55 in the instructions.

52 Your declaration

I declare that:
- the information I have provided is true and correct and that I have no other taxable income
- I have the necessary receipts and records – or expect to obtain them within a reasonable time of lodging this tax return – to support my claims for deductions and tax offsets.

Your signature

Date Day / Month / Year

The Tax Office will issue your assessment based on your tax return. However, the Tax Office has some time to review your tax return, and issue an amended assessment if a review shows inaccuracies that change the assessment. The standard review period is two years but for some taxpayers it is four years. (See page 6 of the instructions.)

If you are lodging this short tax return by phone, call **13 28 65**.
You will be given a receipt number to record here at the end of your call.
For more information on phone lodgment, see pages 3–4 of the loose leaf cover to the *Short tax return for individuals 2009*.

Receipt number