Australian Taxation Office

2000 tax return for individuals

Use *TaxPack 2000* to fill in this tax return. Do not use correction fluid or tape.
Please print neatly in BLOCK LETTERS with a black or blue ballpoint pen only.
Print one letter or number in each box. Print ☒ in appropriate boxes.

NAT 2541—06.2000

Your tax file number (TFN)

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

Are you an Australian resident?

YES ☐ NO ☐

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 2000 you must complete item **A1** on this tax return. Read page 102 in *TaxPack 2000* for more information.

Day Month Year

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

Your daytime telephone number—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 1999–2000 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) for your refund this year?

Read page 10 in *TaxPack 2000* 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 the boxes below.**

BSB number Account number

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

Income

Pages 13–36 in *TaxPack 2000* will help you to correctly fill in the following items.

1 Salary or wages

Your main salary and wage occupation

Description

Name of employer	Tax instalments deducted—show cents	Income—do not show cents
		C ·00
		D ·00
		E ·00
		F ·00
		G ·00

2 Allowances, earnings, tips, director's fees etc.

K ·00

3 Lump sum payments

Amount A in lump sum payments box		R ·00
5% of amount B in lump sum payments box		H ·00

4 Eligible termination payments

Attach the employee's tax return copy of your *ETP group certificate* or letters to page 3 of your tax return.

Taxable amount other than excessive component	I ·00
Excessive component	N ·00

5 Commonwealth of Australia government allowances and payments like Newstart, youth allowance and austudy payment

A ·00

6 Commonwealth of Australia government pensions and allowances

B ·00 REBATE CODE

If you had a spouse during 1999–2000 and you have written code letter **A**, **M**, **E** or **F** in the **REBATE CODE** box, complete **Spouse details—married or de facto** on page 7.

7 Other Australian pensions or annuities—including superannuation pensions

Type

J ·00

TOTAL TAX INSTALMENTS DEDUCTED $ ·

For items 1 to 7 add up all the amounts in the tax instalments deducted column.

8 Total reportable fringe benefits amounts

W ·00

9 Gross interest

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

Gross interest L ·00

Tax file number amounts M ·

10 Dividends

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

Unfranked amount	S ·00
Franked amount	T ·00
Imputation credit	U ·00

Tax file number amounts V ·

I Only used by taxpayers completing the *2000 tax return for individuals* (supplementary section)

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

Make sure that you complete item M2. See pages 96–100 in *TaxPack 2000*.

Attach your employee's tax return copy of group certificates, any income tax credit vouchers and other requested attachments here. Place your group certificates on top, followed by any other attachments.

Do not send in this tax return until you have attached all your group certificates and any other requested attachments.

Deductions

Pages 37–68 in *TaxPack 2000* will help you to correctly fill in the items below.

You must read pages 38–9 in *TaxPack 2000* if you are claiming deductions for expenses that relate to your work as an employee at items D1, D2, D3, D4 and D5.

Deductions—do not show cents

D1	Work related car expenses	A	, ·00	CLAIM ☐ TYPE
D2	Work related travel expenses	B	, ·00	
D3	Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses	C	, ·00	CLAIM ☐ TYPE
D4	Work related self-education expenses	D	, ·00	CLAIM ☐ TYPE
D5	Other work related expenses	E	, ·00	
D6	Interest and dividend deductions	I	, ·00	
D7	Gifts or donations	J	, ·00	CLAIM ☐ TYPE
D8	Deductible amount of undeducted purchase price (UPP) of an Australian pension or annuity You will find information on deductible amount of UPP of foreign pensions or annuities at question **D12** in *TaxPack 2000 supplement*.	L	, ·00	
D9	Cost of managing tax affairs	M	, ·00	
D	**Only used by taxpayers completing the *2000 tax return for individuals* (supplementary section)** Transfer the amount from TOTAL SUPPLEMENT DEDUCTIONS on page 12 and write it here.		, ·00	

TOTAL DEDUCTIONS Add up all the deduction amounts—items D1 to D . , ·00

SUBTOTAL TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS , ·00 LOSS ☐

D10 Tax losses of earlier income years deducted this year

Primary production F , ·00

Non-primary production Z , ·00

TAXABLE INCOME OR LOSS

If you did not complete D10 write the amount from SUBTOTAL here. $, ·00 LOSS ☐

If you did complete D10 you must read page 68 in *TaxPack 2000*.

Don't forget to sign the *Taxpayer's declaration* on page 8.

Rebates/tax offsets

Pages 71–89 in *TaxPack 2000* will help you to correctly claim your rebates/tax offsets.

Rebates/tax offsets—do not show cents

R1 Spouse—married or de facto—child-housekeeper or housekeeper

To claim the spouse rebate you must also complete **Spouse details—married or de facto** on page 7. Separate net income of your spouse must be shown at page 7, not here.

P , .00 CLAIM TYPE

Child-housekeeper's separate net income V , .00

Basic parenting payment (partnered) W , .00

R2 Sole parent

Q , .00 CLAIM TYPE

R3 Low income aged person

If you had a spouse during 1999–2000 you must also complete **Spouse details—married or de facto** on page 7.

The ATO will work out this rebate amount. Print your code letter in the rebate code box. Read pages 79–80 in *TaxPack 2000*.

N REBATE CODE

R4 Superannuation contributions, annuity and pension

Personal undeducted superannuation contributions T , .00

Superannuation contributions, annuity and pension rebates S , .00 CLAIM TYPE

If you make a successful claim for the bonuses for older Australians, the ATO will use the amount you show at T to calculate your bonuses. See page 81 in *TaxPack 2000* for more information.

R5 30% private health insurance

Amount of refundable rebate—not contributions G , .00

You **must** complete **Private health insurance policy details** below.

R Only used by taxpayers completing the *2000 tax return for individuals* (supplementary section)

Transfer the amount from TOTAL SUPPLEMENT REBATES/TAX OFFSETS on page 12 and write it here. , .00

TOTAL REBATES/TAX OFFSETS

Add up the rebate/tax offset amounts in the right-hand column. U $, .00

The ATO will work out any rebate for low income. Read page 68 in *TaxPack 2000* for more information.

Private health insurance policy details

Page 90 in *TaxPack 2000* will help you to correctly fill in your details.

You must provide the details for each policy if items **R5** or **M2** asked you to complete this section.

Health fund ID	Membership number	Type of cover
B	C	
B	C	
B	C	
B	C	
B	C	

Medicare levy related items

Pages 91–100 in *TaxPack 2000* will help you to correctly fill in these items.

M1 Medicare levy reduction or exemption

NOTE

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read pages 92–5 in *TaxPack 2000* 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** ☐☐☐ CLAIM ☐ TYPE

Half 1.5% levy exemption—number of days **W** ☐☐☐

If you had a spouse during 1999–2000 you must also complete **Spouse details—married or de facto** on page 7.

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 96–100 in *TaxPack 2000*.

For the **whole** period 1 July 1999 to 30 June 2000 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. You have now finished this item.

NO ☐ Read on.

For the whole of 1999–2000 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 $1500 for each dependent child after the first) or less?

NO ☐ You may have to pay the surcharge—read pages 96–100 in *TaxPack 2000*.

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 1999 to 30 June 2000
- **'366'** when you do NOT have to pay the surcharge for the whole period 1 July 1999 to 30 June 2000
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 1999 to 30 June 2000.

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

Number of dependent children **D** ☐☐

If you had a spouse during 1999–2000 complete **Spouse details—married or de facto** on page 7.

If you were covered by private patient hospital cover at any time during 1999–2000 you **must** complete **Private health insurance policy details**—see page 90 in *TaxPack 2000*.

Adjustments

Pages 101–13 in *TaxPack 2000* will help you to correctly fill in these items.

A1 Under 18 excepted net income

J , .00 TYPE

A2 Part-year tax-free threshold

Date Day Month Year

Months eligible for threshold N

Income while a full-time student O , .00

You must read pages 103–4 in *TaxPack 2000* to complete this question.

A3 Amount on which family trust distribution tax has been paid

X , .00

If a trust, partnership or company made a distribution to you on which family trust distribution tax has been paid, you **must** read page 105 in *TaxPack 2000*.

A4 Amount on which ultimate beneficiary non-disclosure tax was payable

Z , .00

You must read page 106 in *TaxPack 2000* to complete this question.

A5 Family tax assistance

CAUTION

Only complete this item if you have not received family tax payment in full from Centrelink and you are eligible for family tax assistance (FTA).

Read pages 107–13 in *TaxPack 2000* for more information.

If you had a spouse during 1999–2000 you must also complete **Spouse details—married or de facto** on page 7.

Details of dependants for FTA purposes

For FTA purposes, each dependent child must:

- be under 18 during 1999–2000 AND
- meet the income test explained on pages 107–13 in *TaxPack 2000*.

Given names of FTA dependants	Date of birth (Day, Month, Year)	FULL care: Number of nights	SHARED care *single period*: Number of nights you provided care	SHARED care *single period*: Number of nights others provided care	SHARED care *multiple periods*: Number of nights you provided care
1	A	B	C	D	E
2	A	B	C	D	E
3	A	B	C	D	E
4	A	B	C	D	E
5	A	B	C	D	E

Maximum number of FTA dependent children cared for at any one time from 1 July 1999 to 30 June 2000 inclusive F

Number of nights you provided care for one or more dependent children under 5 years of age from 1 July 1999 to 30 June 2000 inclusive—a maximum of 366 nights. If more than one child under 5 do not count the same night more than once. G

Family tax payment details

Amount of family tax payment received from Centrelink for the dependent children for whom you are claiming FTA. The family tax payment may have been received by you, your spouse, or another person living with you.

Part A H , .00

Part B I .00

Spouse details—married or de facto

Only provide these details if you had a spouse—married or de facto—during 1999–2000 and you completed any of the following items:

- **6** Commonwealth of Australia government pensions and allowances—and you printed **A**, **M**, **E** or **F** in the rebate code box at label **B**
- **R1** spouse rebate
- **R3** low income aged person rebate
- **M1** Medicare levy reduction or exemption
- **M2** Medicare levy surcharge—and you printed **X** in the **NO** box at label **E**
- **A5** family tax assistance
- **R6** superannuation contributions on behalf of your spouse (supplementary section)

Privacy—It is not an offence not to quote your spouse's tax file number (TFN). However, the TFN will help us to process your claim. The TFN may be used to confirm your spouse's income. If you cannot provide the TFN, please provide your spouse's date of birth.

Spouse's tax file number—only complete if you are claiming family tax assistance **J**

Spouse's date of birth **K** Day Month Year

Did you have a spouse for the full year—1 July 1999 to 30 June 2000? **L** YES ☐ NO ☐

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 1999 and 30 June 2000.

M From Day Month Year

N To Day Month Year

You only need to complete spouse's taxable income if any of the following conditions apply:

- You had a spouse on 30 June 2000 AND you completed one or more of items **M1** (label **Y** only) and **A5**.
- You had a spouse for all of 1999–2000 AND you printed **X** in the **NO** box at label **E** item **M2**.
- You had a spouse for any part of the year AND you completed one or more of items **6** (and you printed **A**, **M**, **E** or **F** in the rebate code box at label **B**), **R3**, **R6** and **M1** (label **V** or **W**).

You only need to complete spouse's share of trust income if it has not been included in spouse's taxable income and any of the above conditions relating to **R3**, **M2** and **A5** apply to you.

For any of the following that you are required to complete, if the amount is zero, write '**0**'.

Spouse's 1999–2000 taxable income (**SOURCE CODE** only applies if you completed item **6**. Read pages 25–7 in *TaxPack 2000*.) **O** ,.00 SOURCE CODE

Spouse's share of trust income on which the trustee is assessed under section 98 and which has not been included in spouse's taxable income. **T** ,.00

If you had a spouse for all of 1999–2000 and you printed **X** in the **NO** box at label **E** item **M2** show the distributions to your spouse on which family trust distribution tax has been paid which your spouse would have had to show as assessable income if the tax had not been paid. **U** ,.00

Show your spouse's total reportable fringe benefits if you had a spouse for all of 1999–2000 and you printed **X** in the **NO** box at label **E** item **M2** or you had a spouse at any time during 1999–2000 and you completed item **R6**. **S** ,.00

If you completed item **A5** show the amount of any Commonwealth of Australia government payments—listed at questions **5** and **6** in *TaxPack 2000*—included in your spouse's taxable income. Do not include family tax payment. **P** ,.00

If you completed item **6** show the amount of any exempt pension income—see page 12 in *TaxPack 2000*—received by your spouse in 1999–2000. **Q** ,.00

If you completed item **R1** show your spouse's 1999–2000 separate net income—see page 70 in *TaxPack 2000*. **R** ,.00

If you are completing the supplementary section (pages 9–12) of your tax return—attach it here. →

Is your tax return complete?

Make sure you have completed your tax return correctly. If there are any errors the processing of your tax return may be delayed.

Before you sign the *Taxpayer's declaration* below, check that you have:

- ✓ written your tax file number at the top of page 1 of your tax return
- ✓ filled in all your personal details on page 1 of your tax return
- ✓ filled in the electronic funds transfer (EFT) details on page 1 of your tax return if you want to use EFT to have your refund paid directly into your financial institution account
- ✓ filled in the small boxes—if applicable—at items **6**, **D1**, **D3**, **D4**, **D7**, **R1**, **R2**, **R3**, **R4**, **M1** and **A1**
- ✓ completed **M2—it is compulsory for all taxpayers**
- ✓ completed **Spouse details—married or de facto**, if applicable
- ✓ completed **Private health insurance policy details**, if applicable
- ✓ written totals at TOTAL TAX INSTALMENTS DEDUCTED, TOTAL INCOME OR LOSS, TOTAL DEDUCTIONS, SUBTOTAL, TAXABLE INCOME OR LOSS and TOTAL REBATES/TAX OFFSETS
- ✓ attached to the top left-hand corner of page 3 of your tax return copies of your group certificates and other income statements.

Commissioner's guarantee

Taxpayers who use *TaxPack* properly to complete their tax return are protected by the Commissioner's guarantee. The guarantee is on the inside front cover of *TaxPack 2000* and *TaxPack 2000 supplement*.

TAXPAYER'S DECLARATION

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 *2000 tax return for individuals* (supplementary section)—pages 9 to 12? Read page 5 in *TaxPack 2000* 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 NO ☐ YES ☐

b. *2000 business and professional items schedule*—to page 3 NO ☐ YES ☐

These attachments are in addition to your group certificates and other income statements which you must attach to your tax return.

Privacy

It is not an offence not to quote your tax file number (TFN). However, your TFN helps the Australian Taxation Office (ATO) to correctly identify your tax records.

The ATO is authorised by the *Income Tax Assessment Act 1936* and the *Income Tax Assessment Act 1997* to ask for information in this tax return. We need this information to help us to administer the tax laws.

We may give some of this information to other government agencies authorised by law to receive it, including Centrelink and the departments of Family and Community Services; Veterans' Affairs; and Education, Training and Youth Affairs.

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 1999–2000
- I have completed and attached the supplementary section, schedules and other attachments—as appropriate—that *TaxPack* 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, rebates/tax offsets and family tax assistance AND
- where I have quoted my spouse's tax file number, I have obtained their consent to do so.

IMPORTANT

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

SIGNATURE

Date ☐☐ ☐☐ ☐☐☐☐
Day Month Year

Use the pre-addressed envelope provided with *TaxPack 2000* to lodge your tax return.

For more information, read page 130 in *TaxPack 2000*.