

## 2001 tax return for individuals

**Use *TaxPack 2001* 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  $\overline{X}$  in appropriate boxes.**

**IMPORTANT: Complete your details carefully to avoid delays in processing your tax return.**

[illegible]





## Deductions

**Pages 35–61 in *TaxPack 2001* will help you to correctly fill in the items below.**

**You must read pages 36–7 in *TaxPack 2001* if you are claiming deductions for expenses that relate to your work as an employee at items D1, D2, D3, D4 and D5.**

## D1 Work related car expenses

Deductions—do not show cents

[illegible]

## D2 Work related travel expenses

[illegible]

**D3** Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses

**C**   ,    .~~00~~

#### **D4 Work related self-education expenses**

**D**   ,    .~~00~~

### D5 Other work related expenses

**E**   .

## D6 Interest and dividend deductions

[illegible]

## D7 Gifts or donations

[illegible]

**D8 Deductible amount of undeducted purchase price (UPP) of an Australian pension or annuity**

[illegible]

You will find information on deductible amount of UPP of a foreign pension or annuity at question **D11** in *TaxPack 2001 supplement*.

## D9 Cost of managing tax affairs

M ..

**Only used by taxpayers completing the 2001 tax return for individuals (supplementary section)**

D

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 .   ,    .

**SUBTOTAL**

**TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS**

## Losses

**Pages 62–4 in *TaxPack 2001* will help you to correctly fill in the item below.**

**L1 Tax losses of earlier income years claimed this income year**

Primary production F    .

Non-primary production Z .00

**TAXABLE INCOME  
OR LOSS**

If you did not complete **L1** write the amount from **SUBTOTAL** here.

If you did complete **L1** you must read page 65 in *TaxPack 2001*.

**Pages 72–88 in *TaxPack 2001* will help you to correctly claim your tax offsets.**

CLAIM	TYPE

P

**Child-housekeeper's separate net income**

The ATO will work out this tax offset amount. Print your code letter in the tax offset code box. Read pages 79–80 in *TaxPack 2001*.

**N**

**TAX OFFSET**  
  
**CODE**

## Personal undeducted superannuation contributions T [ ] [ ] [ ] . [ ] [ ] [ ] .00

**Superannuation contributions,  
annuity and pension tax offsets**

	CLAIM TYPE
Q	

**Amount of refundable tax offset—not contributions**

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

## T

Transfer the amount from **TOTAL SUPPLEMENT**  
**TAX OFFSETS** on page 12 and write it here.

Add up all the tax offset amounts items T1 to T . U \$

The ATO will work out any tax offset for low income. Read page 65 in *TaxPack 2001* for more information.

**Page 89 in *TaxPack 2001* will help you to correctly fill in your details.**

You must provide the details for each policy if items **T4** or **M2** asked you to complete this section.

Type of cover

7

7

7

7

7

### M1 Medicare levy reduction or exemption

### Note

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read pages 91–4 in *TaxPack 2001* to work out if you are eligible to claim.

### ***Reduction based on family income***

Number of dependent children and students	Y		
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### Exemption categories

Full 1.5% levy exemption—number of days	V				

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

If you have completed item **M1** and had a spouse during 2000–01 you must also complete **Spouse details—married or de facto** on pages 6–7.

## 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 95–8 in *TaxPack 2001*.**

For the **whole** period 1 July 2000 to 30 June 2001 were **you** and **all** of your dependants (including your spouse)—if you had any—covered by private patient HOSPITAL cover?

**YES** ☐ You **must** complete **Private health insurance policy details** on page 4. You have now finished this item.

E

**NO** ☐ Read on.

For the whole of 2000–01 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 95–8 in *TaxPack 2001*.

**YES** ☐ You do not have to pay the surcharge—you **must** write ‘365’ at **A**.

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

- **'0'** when you have to pay the surcharge for the whole period 1 July 2000 to 30 June 2001
- **'365'** when you do NOT have to pay the surcharge for the whole period 1 July 2000 to 30 June 2001
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 2000 to 30 June 2001.

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

Number of dependent children **D**  

If you had a spouse during 2000–01 complete **Spouse details—married or de facto** on pages 6–7.

If you were covered by private patient hospital cover at any time during 2000–01 you **must** complete **Private health insurance policy details**—see page 89 in *TaxPack 2001*.

**J** [ ] [ ] [ ] [ ] [ ] [ ] .00 TYPE [ ]

**X**

**Z**

**Spouse details—married or de facto (continued)**

Make sure you have checked on page 6 that you need to complete **Spouse details—married or de facto.**

On this page you will need to provide some details about your spouse's income. The text beside the boxes gives instructions to help you determine whether you need to show an income amount, and what information is required.

You only need to complete spouse's 2000-01 taxable income if:

- you had a spouse on 30 June 2001 AND you completed item **M1** (**Y** only)
- you had a spouse for all of 2000-01 AND you printed **X** in the **NO** box at **E** item **M2**
- you had a spouse for any part of the year AND you completed one or more of items **6**, **T2**, **T5** and **M1** (**V** or **W**).

You only need to complete spouse's 2000-01 taxable income if:

- you had a spouse on 30 June 2001 AND you completed item **M1** (**Y** only)
- you had a spouse for all of 2000-01 AND you printed **X** in the **NO** box at **E** item **M2**
- you had a spouse for any part of the year AND you completed one or more of items **6**, **T2**, **T5** and **M1** (**V** or **W**).

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

**Spouse's 2000–01 taxable income**

If you completed item **T2** or **M2** show your 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.

If you had a spouse for all of 2000–01 and you printed ☒ in the **NO** box at **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.

Show your spouse's total reportable fringe benefits amounts if you had a spouse for all of 2000-01 and you printed **X** in the **NO** box at **E** item **M2** or you had a spouse at any time during 2000-01 and you completed item **T5**.

If you completed item 6, show the amount of Commonwealth of Australia government pensions and allowances (listed on page 22 in *TaxPack 2001*) that your spouse received in 2000–01.

If you completed item 6 show the amount of any exempt pension income (listed on page 9 in *TaxPack 2001*) that your spouse received in 2000–01.

If you completed item T1 show your spouse's  
2000-01 separate net income—see page 66-7  
in *TaxPack 2001*.

R ,.00

## Consent to use part or all of your 2001 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 2001 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 2001 AND
- you expect to receive a tax refund for 2001 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 ATO will not be able to use your refund to repay the FTB overpayment.

### Spouse's CRN

         

### Spouse's sex

Male ☐ Female ☐

### Spouse's name

Print full name.

Surname or family name

Given names

### Spouse's date of birth

Day Month Year

I consent to the ATO using part or all of my 2000–01 tax refund to repay the 2001 FTB overpayment of my spouse, whose details I have provided above. I have obtained my spouse's permission to quote their CRN.

Your signature

Date

Day Month Year

## 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 2001 tax return for individuals (supplementary section)—pages 9 to 12? Read page 5 in *TaxPack 2001* 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. 2001 business and professional items schedule—to page 3 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 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 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, Training and Youth Affairs 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 2000–01
- I have completed and attached the supplementary section, schedules and other attachments—as appropriate—that *TaxPack 2001* 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.

### 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 2001* to lodge your tax return.  
For more information, read page 117 in *TaxPack 2001*.