

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 X in appropriate boxes. IMPORTANT: Complete your details carefully to avoid delays in processing your tax return.

	Your tax file number (TFN)										S d	ee t <i>ecla</i>	he ara	Pri tior	vac on	y not pag	te ir e 8 (the of th	<i>Tax</i> nis ta	ax ref	e r's turn.	
	Are you an Australian resident?YESSee page 7 in TaxPack 2001.					NO																
	Your sex Male			F	em	ale																
	Your name Title—for example, Print your full name. Mr, Mrs, Ms, Miss]				
	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 Suburb or completing your last tax return? Suburb or town									1										1		
	Fill in the appropriate box then read on.				Posto	code					Co	unt										
NO	YES										A	ustra	lia L									
	ls your home address different from your postal address?																					
NO	Read on.																					
YES	Suburb or Suburb or town																					
TEO	State			F	Posto	code]		unt if r ustra	iót									
	Your date of birth] [7		ustru										
	If you were under 18 years of age on 30 June 2001 you must complete item A1 on this tax return. Read page 100 in <i>TaxPack 2001</i> for more information.	Da	ay	Mo	onth			Year	r		b	irth	ı to	av	oid	e you delay your	ys ir	ו the	е			
	Your daytime telephone number—If we need	to a	isk	you a	bou	t yo	ur ta	ax r	etur	n, it	is (quic	ke	er b	y te	leph	one					
	Area Telephone number						\square									-						
	Your spouse's name Surname or								1										1	1	1	
	If you had more than one family name spouse during 2000–01 print Given names][][
_	Will you need to lodge an Australian][
	tax return in the future?	'ES]	DO	N'T	KN	OW				N	0		FII	NAL						
	Do you want to use electronic funds transf payment where applicable? Read page 8 in <i>Ta</i>	ier (axPa	EF	T) th 2001 '	is y for	yea mor	r fo e int	r y forn	our natio	tax on.	re	fui	nd	or	fai	nily	ta	x b	ene	fit		
NO	Read on.																					
YES	If you used EFT last year and the account deta do not write them again. Otherwise complete	ails the	you bo	prov	ide	d ar	e co	rrec	ct,													
				numb																		
	Account name — for example, JQ Citizen. Do not					unt f	type	, su	ch a	is ch	iequ	ue,	sa	vin	gs, I	mort	gag	ge o	ffse	t.		

Inc	OME Pages 1	0–34 in <i>TaxPack 2001</i> w	vill help you to correctly fill in the following items.
_		Your mai	in salary and wage occupation
1	Salary or wages	Description	
	Payer's Australian Bu	siness Number	Tax withheld Income – do not show cents
2	Allowances, earn	inas. tips.	
2	director's fees et	G.	
3	Lump sum paymer	nts Amount A in sum payment	
	5% of amo	unt B in lump sum payment	
4	Eligible terminati	on payments	Taxable amount other than
	•	ax return copy of your	
	ETP payment summa of your tax return.	ary or letters to page 3	Excessive component N
5	allowances and p	f Australia government ayments like Newstart, and austudy payment	
6	pensions and allo		
	If you had a spouse of pension listed on page	luring 2000–01 who also ree ge 9 in <i>TaxPack 2001</i> comple	eceived income listed at this question in <i>TaxPack 2001</i> or an exempt lete Spouse details—married or de facto on pages 6–7 of this tax return.
7		pensions or annuities—	_
Type	including superan	nuation pensions	
	Attributed person		
8	Altrinuleu person	al services income	
T0 1	TAL TAX WITHH	ELD	For items 1 to 8 add up all the amounts in the tax withheld column.
9	Total reportable f benefits amounts	ringe W	
10	Gross interest	If you are a non-resident r printed your country of re	
	Tax file r	number amounts M	
11	Dividends	If you are a non-resident r printed your country of re	
		princed your country of re	Franked amount $\boxed{1}$
	Tax file r	number amounts V	
	• • •	• • •	2001 tax return for individuals (supplementary section)
	Tr		on page 11 and write it here.
TOT	AL INCOME OR	LOSS Add up any los	p all the income amounts and deduct \$, , , , , , , , , , , , , , , , , ,

Page 2

Make sure that you complete item M2. See pages 95–8 in *TaxPack 2001*.

Attach your payee's tax return copy of requested payment summaries and other attachments here. Place your payment summaries on top, followed by any other attachments.

Do not send in this tax return until you have attached all requested attachments.

Deductions Pages 35–61 in *TaxPack 2001* will help you to correctly fill in the items below. Deductions-do not show cents CLAIM D1 Work related car expenses Δ ЮЮ You must read TVDF pages 36-7 in D2 Work related travel expenses B ·ØØ TaxPack 2001 if vou are claiming Work related uniform, occupation specific CLAIN deductions for or protective clothing, laundry and **D3** ÒØ С expenses that dry cleaning expenses TYPE relate to your work CLAIM as an employee at D4 Work related self-education expenses D ·ØØ items D1, D2, D3, TYPE D4 and D5. D5 Other work related expenses ٠ØØ **D6** Interest and dividend deductions ·ØØ ·ØØ **D7 Gifts or donations** Deductible amount of undeducted purchase price (UPP) **D8** of an Australian pension or annuity ·ØØ You will find information on deductible amount of UPP of a foreign pension or annuity at question **D11** in *TaxPack 2001 supplement*. D9 ·ØØ Cost of managing tax affairs Μ Only used by taxpayers completing the 2001 tax return for individuals (supplementary section) D Transfer the amount from TOTAL SUPPLEMENT DEDUCTIONS ·ØØ on page 12 and write it here. ·ØØ TOTAL DEDUCTIONS Add up all the deduction amounts items D1 to D LOSS SUBTOTAL ·ØØ **TOTAL INCOME OR LOSS** less **TOTAL DEDUCTIONS** Losses Pages 62-4 in TaxPack 2001 will help you to correctly fill in the item below. Tax losses of earlier income Primary production F ЮŰ L1 years claimed this income year ·ØØ Non-primary production Ζ LOSS If you did not complete **L1** write the ЮŐ **TAXABLE INCOME** amount from **SUBTOTAL** here. **OR LOSS** If you did complete L1 you must read page 65 in TaxPack 2001. Make sure you sign the *Taxpayer's declaration* on page 8. Page 3

Tax	OffSets (formerly called rebates)	Pages 72–88 in <i>TaxPack 2001</i> will help correctly claim your tax offsets.) you to
T1	Spouse (without dependent child or stu child-housekeeper or housekeeper	dent),	Tax offsets – do not show cents
	To claim the spouse tax offset you must also co on pages 6–7. Separate net income of your spo		
	Child-housekeeper's V,)·00	
T2	Low income aged person If you had a spouse during 2000–01 you must also complete Spouse details — married or de facto on pages 6–7.	The ATO will work out this tax offset amount. Print your code letter in the tax offset code box. Read pages 79–80 in <i>TaxPack 2001</i> .	
T3	Superannuation contributions, annuity a Personal undeducted uperannuation contributions	and pension Superannuation contributio annuity and pension tax offs	ons, S, S, CLAIM Sets S, TYPE
T4	30% private health insurance	Amount of refunda tax offset—not contributio	
	You must complete Private health insurance po	olicy details below.	
T		2001 tax return for individuals (supple ofer the amount from TOTAL SUPPLEMENT AX OFFSETS on page 12 and write it here.	mentary section)
TO	TAL TAX OFFSETS Add up all the tax	offset amounts items T1 to T . U \$	
	The ATO will work out any tax offset for lo	ow income. Read page 65 in <i>TaxPack 2001</i> for	more information.

Private health insurance policy details

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.

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

Medicare levy related items

Pages 90-8 in TaxPack 2001 will help you to correctly fill in these items.

Medicare levy reduction or exemption M1

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

Exemption categories

Full 1.5% levy exemption – number of days 🚺

CLAIM TYPE 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.

Medicare levy surcharge (MLS)							
STOP THIS ITEM IS COMPULSORY FOR ALL TAXPAYERS	s.						
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 <i>TaxPack 2001</i> . 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 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 <i>TaxPack 2001</i> .							
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 	► Number of days you do NOT A A						
 - '365' when you do NOT have to pay the surcharge for the whole period 1 July 2000 to 30 June 2001 	Number of dependent children						
 the number of days you do NOT have to pay the surcharge for part of the period 1 July 2000 to 30 June 2001. 							
If you had a spouse during 2000–01 complete Spouse details – m	arried or de facto on pages 6–7.						
If you had a spouse during 2000–01 complete Spouse details — m If you were covered by private patient hospital cover at any time d							

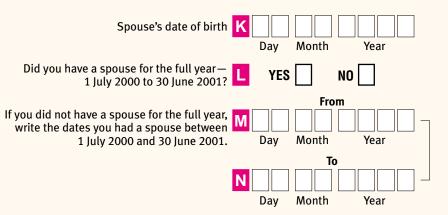
A1	Under 18 excer	ited net income	JOOOO.X
	If you were unde	r 18 years of age on 30 June 2001 you nis item. Read page 100 in <i>TaxPack 2001</i>	
12	Part-year tax-fr Date Day Mo You must read pa		Months eligible N honths eligi
3	If a trust, partner	ch family trust distribution tax has been ship or company made a distribution to you on t distribution tax has been paid, you must read <i>ack 2001</i> .	paid X ,
	Amount on whi	ch ultimate beneficiary	

Did you complete any of the following items?

- 6 Commonwealth of Australia government pensions and allowances and your spouse also received income listed at this question in *TaxPack 2001* or an exempt pension listed on page 9 in *TaxPack 2001*.
- T1 spouse (without dependent child or student) tax offset
- T2 low income aged person tax offset
- M1 Medicare levy reduction or exemption
- M2 Medicare levy surcharge and you printed X in the NO box at
- **T5** superannuation contributions on behalf of your spouse (supplementary section)

You do not need to complete this section. Go to page 8.

YES You need to complete this section. Complete the informatio required below then go to page 7.

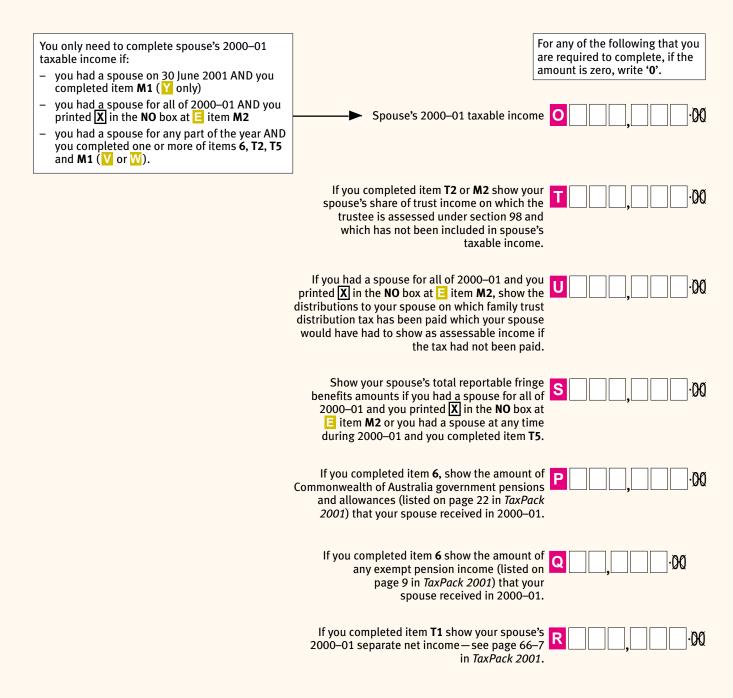


NO

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.



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

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 claimcheck 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			
•		Dav	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.

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

NO

NO

YES

YES

2 Has TaxPack asked you to attach the following?

- a. any attachments relating to specific questions—to page 3
- 2001 business and professional items schedule-to page 3

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