



<p><b>1 Australian Government pensions and allowances</b> You must complete item 20 or 21 in <b>Tax offsets</b>.</p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	Income – do not show cents <b>B</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<p><b>2 Other Australian pensions or annuities – including superannuation pensions</b> Type <input style="width:300px;" type="text"/></p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	<b>J</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<p><b>3 Foreign source pension or annuity income</b></p> <p>Assessable foreign source income <b>E</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00</p>	Net foreign pension or annuity income WITHOUT an undeducted purchase price <b>L</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 Net foreign pension or annuity income WITH an undeducted purchase price <b>D</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	<b>P</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 <small>CODE BOX</small>
<p><b>4 Salary, wages, allowances, earnings etc</b></p>	Tax withheld – do not show cents <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	<b>C</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<p><b>5 TOTAL TAX WITHHELD</b></p>	<b>\$</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 ←	Add up all the amounts in the tax withheld column – items 1, 2 and 4.
<p><b>6 Total reportable fringe benefits amounts</b></p>	<b>W</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p><b>7 Gross interest</b></p> <p>Tax file number amounts withheld from gross interest <b>M</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .<input type="text"/> <input type="text"/></p>	Gross interest <b>L</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p><b>8 Dividends</b></p> <p>Tax file number amounts withheld from dividends <b>V</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .<input type="text"/> <input type="text"/></p>	Unfranked amount <b>S</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 Franked amount <b>T</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 Franking credit <b>U</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	
<p><b>9 Capital gains</b></p> <p>Did you have a capital gains tax event during the year? <b>G</b> NO <input type="checkbox"/> YES <input type="checkbox"/></p> <p>If you received a distribution of a capital gain from a trust, you cannot complete this tax return – use the tax return (supplementary section).</p> <p>Net capital gain <b>A</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00</p> <p>Total current year capital gains <b>H</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00</p> <p>Net capital losses carried forward to later income years <b>V</b> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00</p>		
<p><b>10 TOTAL INCOME</b></p>	Add up all the income amounts in the right hand column – items 1 to 9. <b>\$</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00	

**Make sure that you complete item 27. See pages 72–6 in *Retirees TaxPack 2006*.**



Please attach your Centrelink or Department of Veterans' Affairs payment summary, statement or letter, '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 your tax return until you have attached all requested attachments.

**DEDUCTIONS** Pages 36–50 in *Retirees TaxPack 2006* will help you to claim all your deductions correctly.

<b>11</b>	<b>Subscriptions</b>	Deductions – do not show cents <b>E</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>12</b>	<b>Interest and dividend deductions</b>	<b>I</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>13</b>	<b>Gifts or donations</b>	<b>J</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>14</b>	<b>Deductible amount of undeducted purchase price of an Australian pension or annuity</b>	<b>L</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>15</b>	<b>Deductible amount of undeducted purchase price of a foreign pension or annuity</b>	<b>Y</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>16</b>	<b>Cost of managing tax affairs</b>	<b>M</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>17</b>	<b>TOTAL DEDUCTIONS</b>	Add up all the deduction amounts at items 11 to 16. \$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>18</b>	<b>TAXABLE INCOME</b>	Subtract the amount at item 17 from the amount at item 10. \$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

**TAX OFFSETS** Pages 51–66 in *Retirees TaxPack 2006* will help you to claim your tax offsets correctly.

<b>19</b>	<b>Spouse – married or de facto</b>	To claim the spouse tax offset you must also complete <b>Spouse details – married or de facto</b> on page 5 of your tax return.	Tax offsets – do not show cents <b>P</b> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>20</b>	<b>Senior Australians (includes age pensioners, service pensioners and self-funded retirees)</b>	The Tax Office will work out this tax offset amount. Print your code letter in the <b>TAX OFFSET CODE</b> box. Read pages 55–6 in <i>Retirees TaxPack 2006</i> .	<b>TAX OFFSET CODE</b> <b>N</b> <input type="text"/> <b>VETERAN CODE</b> <b>Y</b> <input type="text"/>
<b>21</b>	<b>Pensioner</b>	<b>–</b> If you completed item 20 Senior Australians above DO NOT complete this item. The Tax Office will work out this tax offset amount. Print your code letter in the <b>TAX OFFSET CODE</b> box. Read pages 57–8 in <i>Retirees TaxPack 2006</i> .	<b>TAX OFFSET CODE</b> <b>O</b> <input type="text"/> <b>VETERAN CODE</b> <b>T</b> <input type="text"/>
<b>22</b>	<b>Superannuation annuity and pension</b>		<b>S</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>23</b>	<b>Private health insurance</b>	Amount of refundable tax offset not previously claimed by way of reduced private health insurance premiums You must complete <b>Private health insurance policy details</b> on page 4.	<b>G</b> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>24</b>	<b>20% tax offset on net medical expenses over the threshold amount</b>		<b>X</b> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
<b>25</b>	<b>TOTAL TAX OFFSETS</b>	Add up all the tax offset amounts at items 19, 22, 23 and 24.	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

The Tax Office will work out any low income tax offset and mature age worker tax offset. Read page 66 in *Retirees TaxPack 2006* for more information.

You must provide the details for each policy if item **23** or **27** asked you to complete this section.

Health fund ID

**B**

**B**

**B**

Membership number

**C**

**C**

**C**

Type of cover

**MEDICARE LEVY RELATED ITEMS**

Pages 68–76 in *Retirees TaxPack 2006* will help you to fill in these items correctly.

**26 Medicare levy reduction or exemption**

**! NOTE**

Only certain taxpayers are entitled to a Medicare levy reduction or exemption. Read question **26** in *Retirees TaxPack 2006* to work out if you are eligible to claim.

**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 **26** and had a spouse during 2005–06 you must also complete **Spouse details – married or de facto** on page 5 of your tax return.

**27 Medicare levy surcharge**

**THIS ITEM IS COMPULSORY FOR ALL TAXPAYERS.**

If you do not complete this item you may be charged the full Medicare levy surcharge (MLS).

To help you determine if you have to pay the surcharge read pages 72–6 in *Retirees TaxPack 2006*.

For the **whole** period 1 July 2005 to 30 June 2006 were **you** and **your spouse – married or de facto** (if you had one) covered by private patient HOSPITAL cover?

**E** **YES**  You **must** complete **Private health insurance policy details** above. You have now finished this item.

**NO**  Read on.

For the whole of 2005–06 were you:

- **a single person** and your taxable income for MLS purposes (including your total reportable fringe benefits amounts) was \$50,000 or less, **OR**
- **married** or in a de facto relationship and the combined taxable income for MLS purposes (including the total reportable fringe benefits amounts) of you and your spouse was \$100,000 or less?

**NO**  You may have to pay the surcharge. Read pages 72–6 in *Retirees TaxPack 2006*.

**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 2005 to 30 June 2006
- **365** when you do NOT have to pay the surcharge for the whole period 1 July 2005 to 30 June 2006
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 2005 to 30 June 2006.

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

If you had a spouse during 2005–06 complete **Spouse details – married or de facto** on page 5 of your tax return.

If you were covered by private patient hospital cover at any time during 2005–06 you must complete **Private health insurance policy details** above.

**Make sure you sign the Taxpayer’s declaration on page 6 of your tax return.**



## Is your tax return complete?

Before you lodge your tax return, 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 appropriate details on page 1 of your tax return if you want to use electronic funds transfer to have your refund paid directly into your financial institution account
- filled in the code boxes – if applicable – at items **20** and **21**
- completed item **27** – **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 WITHHELD, TOTAL INCOME, TOTAL DEDUCTIONS, TAXABLE INCOME** and **TOTAL TAX OFFSETS**
- attached to the top left-hand corner of page 3 of your tax return copies of your payment summaries and other requested documents
- signed and dated the *Taxpayer's declaration* below.

## Commissioner's guarantee

Taxpayers who use *Retirees TaxPack 2006* properly to complete their tax return are protected by the Commissioner's guarantee. The guarantee is on the inside front cover of *Retirees TaxPack 2006*.

## TAXPAYER'S DECLARATION

All taxpayers must sign and date the declaration below.

I declare that:

- all the information I have given on this tax return, including any attachments, is true and correct
- I have shown all my income – including net capital gains – for tax purposes from sources in and out of Australia for 2005–06
- I have completed item **27** – Medicare levy surcharge, and
- 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.

Did *Retirees TaxPack 2006* ask you to attach additional information to your tax return?

NO  YES

### Privacy

The Tax Office is authorised by the *Taxation Administration Act 1953* to request you to quote your tax file number (TFN). It is not an offence not to quote your TFN. However, your assessment may be delayed if you do not quote your TFN.

The Tax Office is also 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 the other 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 as authorised in taxation law – for example, benefit payment agencies such as Centrelink, the Department of Education, Science and Training, and the Department of Families, Community Services and Indigenous Affairs; law enforcement agencies such as state and federal police; and other agencies such as the Child Support Agency, the Australian Bureau of Statistics and the Reserve Bank of Australia.

### 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"/>

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 to issue a revised 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 10 in *Retirees TaxPack 2006*).

**Use the pre-addressed envelope provided with *Retirees TaxPack 2006* to lodge your tax return.  
For more information, read page 79 in *Retirees TaxPack 2006*.**