



Australian Government
Australian Taxation Office

Tax return for **retirees**

2007

1 July 2006 to 30 June 2007

Use *Retirees TaxPack 2007* to fill in this tax return. Please print neatly in **BLOCK LETTERS** with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box. Print in appropriate boxes. Complete your details carefully to avoid delays in processing your tax return.

Your tax file number (TFN)

<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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See the **Privacy** note in the *Taxpayer's declaration* on the last page of your tax return.

Your sex

Male Female

Your name

Print your full name.

Title – for example, Mr, Mrs, Ms, Miss

<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Surname or family name

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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Has any part of your name changed since completing your last tax return?

NO YES

Previous surname

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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Your postal address

Print the address where you want your mail sent.

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO YES

Suburb or town

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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State

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country

if not Australia

Is your home address different from your postal address?

NO Read on.

YES Print your home address.

Suburb or town

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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State

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country

if not Australia

Your date of birth

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

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Your daytime telephone number – If we need to ask you about your tax return, it is quicker by telephone.

Area code

Telephone number

<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Your spouse's name

If you had more than one spouse during 2006–07 print the name of your latest spouse.

Surname or family name

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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Given names

<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
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Will you need to lodge an Australian tax return in the future?

YES

DON'T KNOW

NO **FINAL TAX RETURN**

Do you want your refund paid directly into your financial institution account?

Read page 14 in *Retirees TaxPack 2007* for more information.

NO Read on.

YES Fill in the BSB number, account number and account name below.

BSB number

Must be six digits

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Account number

<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"/>	<input type="text"/>
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Account name – for example, JQ Citizen. Do not show the account type, such as cheque, savings, mortgage offset.

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

Make sure that you complete item 27. See pages 73–6 in *Retirees TaxPack 2007*.



Attach here any document *Retirees TaxPack 2007* tells you to attach.

Note that you no longer need to attach payment summaries, letters or statements of your income to your tax return. These should be kept as part of your records.

DEDUCTIONS

Pages 36–49 in *Retirees TaxPack 2007* will help you to claim all your deductions correctly.

11	Subscriptions	Deductions – do not show cents E <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
12	Interest and dividend deductions	I <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
13	Gifts or donations	J <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
14	Deductible amount of undeducted purchase price of an Australian pension or annuity	L <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
15	Deductible amount of undeducted purchase price of a foreign pension or annuity	Y <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
16	Cost of managing tax affairs	M <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
17	TOTAL DEDUCTIONS	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
18	TAXABLE INCOME	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 50–67 in *Retirees TaxPack 2007* will help you to claim your tax offsets correctly.

19	Spouse – married or de facto	To claim the spouse tax offset you must also complete Spouse details – married or de facto on page 5 of your tax return.	Tax offsets – do not show cents P <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
20	Senior Australians (includes age pensioners, service pensioners and self-funded retirees)	If you had a spouse during 2006–07 you must also complete Spouse details – married or de facto on page 5 of your tax return.	The Tax Office will work out this tax offset amount. Print your code letter in the TAX OFFSET CODE box. Read pages 55–6 in <i>Retirees TaxPack 2007</i> .
			N TAX OFFSET CODE <input type="text"/>
			Y VETERAN CODE <input type="text"/>
21	Pensioner	– 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 TAX OFFSET CODE box. Read pages 57–8 in <i>Retirees TaxPack 2007</i> .
			O TAX OFFSET CODE <input type="text"/>
			T VETERAN CODE <input type="text"/>
22	Superannuation annuity and pension		S <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
23	Private health insurance	Amount of refundable tax offset not previously claimed by way of reduced private health insurance premiums	G <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
		You must complete Private health insurance policy details on page 4.	
24	20% tax offset on net medical expenses over the threshold amount		X <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
25	TOTAL TAX OFFSETS	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 67 in *Retirees TaxPack 2007* 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 69–76 in *Retirees TaxPack 2007* 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 2007* 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 2006–07 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 73–6 in *Retirees TaxPack 2007*.

For the **whole** period 1 July 2006 to 30 June 2007 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 2006–07 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 73–6 in *Retirees TaxPack 2007*.

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 2006 to 30 June 2007
- **365** when you do NOT have to pay the surcharge for the whole period 1 July 2006 to 30 June 2007
- **the number of days** you do NOT have to pay the surcharge for part of the period 1 July 2006 to 30 June 2007.

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

If you had a spouse during 2006–07 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 2006–07 you must complete **Private health insurance policy details** above.

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

SPOUSE DETAILS – MARRIED OR DE FACTO

If you completed any of the items listed below, and you had a spouse during 2006–07, you must complete **Spouse details – married or de facto**. We need the information included in this section to assess your tax accurately.

Did you complete any of the following items?

- | | |
|---|---|
| 19 Spouse tax offset | 26 Medicare levy reduction or exemption |
| 20 Senior Australians tax offset | 27 Medicare levy surcharge – and you printed X in the NO box at E |
| 21 Pensioner tax offset | |

NO You do not need to complete this section. Go to page 6 of your tax return.

YES You need to complete this section. Complete the information required below then go to page 6 of your tax return.

Spouse's date of birth **K**

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Did you have a spouse for the full year – 1 July 2006 to 30 June 2007? **L** YES NO

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 2006 and 30 June 2007.

From

M

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

To

N

DAY		MONTH		YEAR	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The information below relates to your spouse's income. The following list shows which details you need to complete.

If you have completed:

■ item 19	complete R
■ item 20 or 21	complete O , T , P and Q
■ item 26 (V or W)	complete O
■ item 27 and you printed X in the NO box at E	complete O , T , U and S if you had a spouse for all of 2006–07 or your spouse died during the year.

For any of the following that you are required to complete, if the amount is zero, do not leave blank – write **0**.

Spouse's 2006–07 taxable income **O**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

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 **T**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

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**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Your spouse's total reportable fringe benefits amounts **S**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Australian Government pensions and allowances are listed on page 17 in *Retirees TaxPack 2007*.

Amount of Australian Government pensions and allowances that your spouse received in 2006–07 (not including **exempt pension** income) **P**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Exempt income is listed on pages 15–16 in *Retirees TaxPack 2007*.

Amount of any exempt pension income that your spouse received in 2006–07 (make sure you only include your spouse's **exempt pension** income) **Q**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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See pages 50–1 in *Retirees TaxPack 2007* for information on separate net income.

Your spouse's 2006–07 separate net income **R**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.00

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 documents which *Retirees TaxPack 2007* tells you to attach
- signed and dated the *Taxpayer's declaration* below.

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 2006–07
- 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 2007* 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 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 11 in *Retirees TaxPack 2007*).

**Use the pre-addressed envelope provided with *Retirees TaxPack 2007* to lodge your tax return.
For more information, read page 80 in *Retirees TaxPack 2007*.**