Australian Government
Australian Taxation Office

Application for refund of franking credits for individuals 2021

1 July 2020 to 30 June 2021
For individuals who do not need to lodge a tax return

You must read the publication *Refund of franking credits instructions and application for individuals 2021* before you complete this application.
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 X in appropriate boxes.

40980621

1 Your tax file number (TFN)

If you do not have a TFN, or you are unsure, see page 3 in the instructions.

See the Privacy note in the Taxpayer's declaration.

2 Were you an Australian resident for the whole period 1 July 2020 to 30 June 2021?

See page 3 in the instructions if you are unsure.

Yes

If you were not an Australian resident for this whole period, you **cannot** use this application – see page 3 in the instructions for more information.

3 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 you last gave us your details?

No Yes

If you printed X in the **Yes** box, see page 3 in the instructions.

4 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

If lodging by phone and you printed X in the **Yes** box, see page 3 in the instructions.

5 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

6 Your date of birth

Day / Month / Year

7 Your daytime phone number – if we need to ask you about your application, it is quicker by phone.

Area code Phone number

8 Your spouse's name

If you had more than one spouse during 2020–21, print the name of your latest spouse.

Surname or family name

Given names

9 Electronic funds transfer (EFT)

We need your financial institution details to pay any refund owing to you, even if you have provided them to us before. Write the BSB number, account number and account name below. (See the relevant instructions.)

BSB number (must be six digits) ☐☐☐☐☐☐ Account number ☐☐☐ ☐☐☐ ☐☐☐

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

10 Dividends

If you have more than one dividend or distribution statement, see pages 3–5 in the instructions.

Did you receive any dividend distributions from a managed fund or Australian franking credits from a New Zealand company? **Yes** ☐

See page 3 in the instructions.

Do not show cents

Unfranked amount **S** ☐☐,☐☐☐.~~00~~

Franked amount **T** ☐☐,☐☐☐.~~00~~

Franking credit **U** ☐☐,☐☐☐.~~00~~

Show dollars and cents

Tax file number amounts withheld from dividends **V** ☐,☐☐☐.☐☐

TOTAL DIVIDEND INCOME **Add up all the amounts at S, T and U.** **$** ☐☐,☐☐☐.~~00~~

Is your application complete?

Make sure you have completed your application correctly. Errors may delay the processing of your application.

Before you sign *your declaration* below, check that you have:

- ☐ written your TFN on page 1 of this application to avoid delays in processing
- ☐ filled in all your personal details on page 1
- ☐ written your financial institution account details on this page to have your refund paid directly into your financial institution account
- ☐ correctly completed all of your dividend details for 2020–21.

Declaration

Privacy

The ATO is authorised by the *Taxation Administration Act 1953* to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However if you do not provide your TFN, there may be a delay in processing this application.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to **ato.gov.au/privacy**

Read and sign the declaration after completing your application. Even though someone else may have helped you to complete your application, you are responsible for the information provided and you must sign the declaration.

I declare that:

- all the information I have given on this application is true and correct
- I do not need to lodge a tax return and have no tax payable for the 2020–21 income year
- I have shown the total of my dividend income and franking credits received during the 2020–21 income year AND
- I have the necessary records to support my application for a refund of franking credits.

Important

The ATO may confirm with the payer who sent you your dividend or distribution statement that the information you have provided on this application is correct. The tax law imposes heavy penalties for giving false or misleading information.

If lodging by phone, record your receipt number here.

Receipt number ☐☐☐☐☐☐☐☐☐☐

Signature (For your application to be valid you must sign below.)

Date Day ☐☐ / Month ☐☐ / Year ☐☐☐☐