

# SALARY PACKAGE APPLICATION FORM

Use this form to apply for salary packaging through Salary Options.

You may need to fill out other forms as well if you wish to apply for a Salary Packaging Card, Meals Card, etc. – you can find these and information sheets to help you fill out our forms on our website: [www.salaryoptions.com.au](http://www.salaryoptions.com.au), or contact Salary Options on 1300 660 416.

## 1. Your details

Organisation name:		Department:	
Job title:		Payroll number:	
Dr/Mr/Mrs/Ms/Miss	First name:	D.O.B: / /	
	Last name:		
Postal address:		Suburb:	
	State:	Postcode:	
Phone number:	Work: ( )	Home: ( )	Mobile:
Email address:			

**Please tick any items below that apply to you**

- Company car     
  Child Support payment     
  HELP (previously HECS)  
 (HELP calculator available on our website)

*Please note: If you salary package you may be liable for additional Medicare Levy. You may need to pay extra tax to cover this or take out private health insurance. Salary packaging may also impact on HELP – you may wish to consider paying extra tax to offset this. Contact Salary Options if you have any questions regarding your particular situation.*

Your Gross Annual Salary \$ \_\_\_\_\_ (for salary packaging comparison)

## 2. Amounts you wish to package

	Per fortnight	Total over year
Capped amount	\$	\$
Meal Entertainment* (see information sheet for details)	\$	\$
Superannuation** (see information sheet for details)	\$	\$
Other exempt items (contact Salary Options for a list of exempt items)	\$	\$
Exempt items can be paid off over a set time – please specify how many pay periods are required	over _____ pay periods	
<b>Subtotal</b>	\$	\$
<b>Add our fee</b>	\$	\$
<b>This is the amount that will be deducted from your pay</b>	\$	\$

\* Do you wish to apply for the Salary Packaging Card?       Yes       No

\*\* Do you wish to apply for the Meal Entertainment Card?       Yes       No

Name: \_\_\_\_\_ Payroll No: \_\_\_\_\_ Organisation name: \_\_\_\_\_

### 3. Attach documented evidence/substantiation

This is the evidence that supports your packaging of any of the following:

<b>Mortgages/Loans</b>	Schedule of repayments from your bank
<b>Rent</b>	Rental Agreement from your real estate agent or landlord
<b>Credit card</b>	Full statement of total purchases made for the month to the value required
<b>Line of credit</b>	Only interest amounts may be packaged – provide a copy of statements
<b>Receipts</b>	Must be in your name, your spouse's name, or joint names

The Total Value of Evidence should equal the total amounts you wish to package (see Section 2). If not, you will need to forward evidence as required each month, such as credit card statements.

See Information Sheet for Salary Package Application Form (attached, or download it from our website: [www.salaryoptions.com.au](http://www.salaryoptions.com.au)) for the types of documentation required.

Description of evidence attached (please retain originals – provide copy only)	Total Annual Value
1.	\$
2.	\$
3.	\$
4.	\$
<b>Total Value of Evidence</b>	<b>\$</b>

### 4. Nominate account/s to deposit payment/s

Account name	Bank	BSB (or Biller Code for credit card)	Account# or credit card number	Any other reference number	Fortnightly amount to be deposited
					\$
					\$
					\$
Super fund:		Member number:			\$
* If payment is going to a credit union account please check with your credit union for correct account number.			Salary Packaging Card		\$
			Meal Entertainment Card		\$
			<b>Total</b>		<b>\$</b>

### 5. Declaration

I confirm that the above details are true and correct, and that I have attached the evidence required to support my salary packaging claim. I understand that I am liable for any Fringe Benefits Tax (FBT) incurred due to incorrect information provided to Salary Options under my salary packaging arrangements.

Signature: \_\_\_\_\_ Date: / /

## Information Sheet for Salary Package Application Form

*Note: the FBT year runs from 1st April – 31st March*

### What type of evidence / substantiation do I need to provide to receive my benefits?

#### 1. Capped benefit types (GST free) to the value of \$9,095 or \$16,050.

##### **Mortgage**

- A copy of your payment schedule or letter from your loan provider stating the minimum payment required.
- Frequency of payments, e.g. monthly, fortnightly etc.
- If salary packaged funds are being directly transferred to a loan account no minimum repayment is required, however a current statement is required showing the loan is still current.

##### **Personal loan**

- A copy of your payment schedule or letter from your loan provider stating the minimum payment required.
- Frequency of payments, e.g. monthly, fortnightly etc.
- If salary packaged funds are being directly transferred to a loan account, no minimum repayment is required, however a current statement is required showing the loan is still current.

##### **Property rental**

- A copy of your agency or landlord's agreement stating the amount of rent, or a letter from your landlord.
- Frequency of payments, e.g. monthly, fortnightly etc.

##### **Line of credit (interest only)**

- Statement of mortgage with interest charges/payments.

##### **Credit card**

- Copy of statement (summary page) with total of new purchases. Salary Options calculates the evidence by calculating the total purchases made on a statement.
- Payments made on a credit card are not accepted .
- An outstanding balance is not accepted.
- Cash withdrawals and/or fees are not accepted.

##### **Health insurance**

- Copy of insurance policy with fee payable.
- Frequency of payments, e.g. monthly, fortnightly etc.

##### **Life insurance**

- Copy of insurance policy with fee payable.
- Frequency of payments, e.g. monthly, fortnightly etc.

##### **Rates (council and water)**

- Copy of rates notice – paid.

### School fees

- Invoice showing cost of expense in transaction detail.
- Payments made to school are not accepted.
- An outstanding balance is not accepted.

### Child care (not in-house)

- Copy of statements or invoices paid.

### HELP (previously HECS) debt

- Invoice showing total current debt.

### International travel

- Copy of invoices paid.
- Airline tickets.
- International tours and/or activities.
- Items that are purchased overseas and are brought to Australia are not acceptable.

### Medical expenses

- Invoice showing cost of expense in transaction detail.

### Salary Packaging Card

- No need to provide substantiation.
- (GST inclusive) to the value of \$9,095 or \$16,050.

### Insurance (contents, home and vehicle)

- Copies of insurance policies with fee payable.
- Frequency of payments e.g. monthly, fortnightly, etc.

### Living expenses e.g. grocery bills

- Grocery bills, etc.

### Utility expenses

- Monthly / bi-monthly / quarterly utilities bills.

### Vehicle registration

- Copies of any paid invoices.

## 2. Exempt benefit types

### Meal Entertainment expenses

- **Original** receipts which **you have paid for** and have not been reimbursed by anyone else. Valid for restaurant and dine-in café meals and catering costs for functions (where the sole or dominant purpose is the consumption of food and drink).
- **No** take-away receipts are acceptable.
- Drink or beverage only receipts are **not** accepted.
- Entertainment must be included in the cost of the meal (e.g. tram car restaurant, Draculas theatre restaurant, etc.).
- Expense **MUST** be incurred by the you or your partner (you may have to prove that you purchased the meal).

### **Accommodation and venue hire**

- You must provide a full invoice with accommodation details itemised. Packaged deals that do not separate accommodation cannot be used.
- Expense **MUST** be incurred by the you or your partner.
- A Holiday and Function Accommodation Reimbursement Form must be completed and returned with your claim.

### **International travel, meals and accomodation**

- When processing reimbursement applications that involve foreign currency transactions, we will use the applicable conversion rate on the day of processing the claim. If, however, you can provide official documentation confirming the exchange rate at the time of purchase, we will use this rate to convert to AUD.

### **Remote Area Housing**

- Copy of rental receipts or mortgage statement with interest charges for twelve month period (January–December).
- You can only claim 50% of the interest or rent incurred over a 12 month period.
- Remote Area Housing amount cannot exceed capped amount.

### **Laptop computer**

- Copy of invoice attached to Laptop Reimbursement Form.
- If laptop was purchased prior to 13/05/08, you can be reimbursed whether laptop is for work or personal use.
- If laptop was purchased after 13/05/08, you must provide the Laptop Reimbursement Form authorised by Management.
- Laptop reimbursement will cease 31/03/09.

### **Superannuation**

- Superannuation fund must comply with ATO requirements.
- You must provide your membership number.
- Check with your employer as they may only do payments 'in-house'.

***If you have questions or would like more information in relation to setting up this product contact Salary Options on 1300 660 416 or go to our website: [www.salaryoptions.com.au](http://www.salaryoptions.com.au).***

***This information, provided by Salary Options, is of a general nature relating to salary packaging. It has not been prepared with any particular investment objectives, nor does it take into account the financial situation and needs of individual employees. You should, if you consider it necessary, seek financial advice from your Financial Advisor or Accountant.***