

Australian Tax Refund

APPLICATION FORM

1. Complete these forms
2. Attach any Payment Summaries/Payslips
3. Scan and email to tax@advantax.com.au or fax to (02) 9283 8803 or mail to Advantax, Locked Bag A4035 Sydney South NSW 1235 or visit us at 234 Sussex Street, Sydney.

CONTACT INFORMATION

First Name: _____

Family Name: _____

Mr Mrs Miss

Date of Birth: _____

Telephone: _____

Mobile: _____

Email: _____

REFUND PAYMENT

How do you want to receive your tax refund?

Bank Transfer in Australia

Bank Transfer Overseas

Full Name: _____

Account Number: _____

Bank Name: _____

Address of the Bank: _____

Bank Branch code: _____

SWIFT / BIC code: _____

STATUS INFORMATION

Date of Arrival in Australia: _____

Date of Departure in Australia: _____

Tax File Number: _____

Visa Type: _____

Employment Information

Company Name: _____

City / Town: _____

Email / Phone: _____

Do you have your PAYG / final pay slip?

Yes No

If no, would you like us to source replacements?

Yes No

Started: _____ Finished: _____

Are you a member of a superannuation Fund?

Yes No

Name of Fund: _____

Member Number: _____

Employment Information

Company Name: _____

City / Town: _____

Email / Phone: _____

Do you have your PAYG / final pay slip?

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Advantax
234 Sussex Street
Sydney
NSW 2000

Phone: (02) 8987 3700
Fax: (02) 9283 8803
E-mail: tax@advantax.com.au

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POWER OF ATTORNEY AND DECLARATION OF REPRESENTATIVE

Taxpayer: Name: _____
Tax File Number: _____
Date of Birth: _____

Hereby appoint the following representative as attorney- in fact:

Addsum Accountants (Tax Agent No. 72419008)
234 Sussex Street
Sydney, 2000
Australia

To act as the taxpayers legal representative for the filing of all personal income tax returns and dealing with the Australian Taxation Office on all matters for the period continuing until this authority is withdrawn in writing.

Acts authorized: The representative is authorized to receive and inspect confidential tax information and to perform any and all acts that I can perform with respect to the tax types and periods described above.

This includes:

- A) requesting and receiving from my employer(s) payment summaries, statement of earnings or TFN; and
- B) Prepare, sign and lodge my Australian tax return
- C) Signing any agreements, consents or other documents required to refund any overpaid taxes; and
- D) Requesting my tax assessment prior to the end of the financial year and arranging the refund to be sent Addsum's Trust account.

I agree to and accept the terms and conditions of service as provided to me. As attached and any changes in the terms and conditions which Addsum Accountants may effect from time to time, and to the fees of the agent which represents the services I have requested and which are provided by Addsum Accountants.

I understand that once my refund is processed, it will be sent to my bank account by bank transfer, net of any fees which have been agreed as payable to Addsum.

I declare that the information provided is true and correct.

Taxpayer
Signature: _____ Date: _____
Print name: _____

For Addsum Accountants use

I declare that:

- 1) I have prepared this income tax return in accordance with the information supplied by the individual.
- 2) I have received a declaration made by the individual that the information provided to me for the preparation of this document is true and correct: and
- 3) I am authorized by the individual to give the information in this document to commissioner.

Addsum Accountants:
Signature: _____ Date: _____
Print name: _____

Important: the law imposes heavy penalties on you for giving false or misleading information.

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RESIDENCY QUESTIONNAIRE

Full Name: _____ Date of Birth: _____

Please read and fill out all questions on the form below as your responses will determine whether you are treated as a resident for Australian tax purposes.

1. Have you stayed or intend to stay in Australia continuously for 6 months or more?

Yes No

2. Is your visa classification "working holiday subclass 417"?

Yes No

3. Where do you live in Australia?

- designated host family
- rented /shared accommodation
- university campus
- other - details _____

4. If Work and Travel Club member—membership number _____

Yes No

5. Do you receive other income from sources outside of Australia?

Yes No

6. Have you received any other income from sources inside Australia? (e.g. Bank interest, dividends , etc)

Yes No

7. Do you intend to take up residence in Australia?

Yes No

8. Are you migrating and settling in Australia?

Yes No

9. Have you previously lodged an Australian tax return?

Yes No

10. If yes, what tax year did you lodge a return for?

_____/____

11. If yes, were you classed and taxed as a resident?

Yes No

If in doubt as to your residency status you should visit the Australian Tax Office (ATO) Website (www.ato.gov.au) to help you determine your residency status prior to proceeding with your return. On entering the ATO web page type "residency" in the search field. This will take you through the "Are you a resident?" questionnaire.

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