

centrelink

When to use this form



Use this form to tell us about your income and assets so we can work out your (and your partner's) payment.

If you have a partner

You must tell us about your partner's income and assets.
You can complete this form for both you and your partner.

OR

You may choose to complete an **Income and assets (SA369)** form separately.

If you choose this option, tick this box

If you need more copies of this form, go to servicesaustralia.gov.au/forms

Online account



Upload documents

You can upload this form, with any supporting documents, online.

For more information about how to access an online account or how to lodge documents online, go to servicesaustralia.gov.au/centrelinkuploaddocs

Many of our customers find it easier to update their details using their Centrelink online account.

You need a myGov account to link and use your Centrelink online account. If you do not have a myGov account, go to my.gov.au and create one. For help, go to servicesaustralia.gov.au/onlineguides

What else you will need to provide

Important note: If you are making a claim, you must return this form and **all** other supporting documents at the same time you lodge your form. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

For more information

Go to servicesaustralia.gov.au/income or servicesaustralia.gov.au/assets

If you need to call us, go to servicesaustralia.gov.au/phoneus



Information in your language

We can translate documents you need for your claim or payment for free.

To speak to us in your language, call **131 202**.



Hearing and speech assistance

If you have a hearing or speech impairment, you can use:

- the National Relay Service **1800 555 660**, or
- our TTY service on **1800 810 586**. You need a TTY phone to use this service.

For more information about help with communication, go to servicesaustralia.gov.au and search 'other support and advice'.

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centrelink

Filling in this form

You can complete this form on your computer using Adobe Acrobat Reader, or you can print it.

For help on how to fill in our forms, go to servicesaustralia.gov.au/formhelp

If you have a printed form:

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this ► **Go to 1** skip to the question number shown.
- You and your partner can both use this form. However, for privacy, you may choose to complete separate forms.

About you

1 Your Customer Reference Number (if known)

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

2 Your name
Family name

First given name

Second given name

3 Your date of birth (DD MM YYYY)

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

4 Do you have a partner?

No ► **Go to 8**

Yes ► **Go to next question**

5 Your partner's Customer Reference Number (if known)

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

6 Your partner's name
Family name

First given name

Second given name

7 Your partner's date of birth (DD MM YYYY)

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

Employment related income

8 Are you (and/or your partner) currently paid or expecting to be paid any income from work other than self-employment?


Include gross income from:

- wages
- salaries
- amounts voluntarily salary sacrificed into superannuation
- the value of employer provided fringe benefits.

Do not include self-employment or business income. This will be asked later in the form.

No ► **Go to 10**

Yes ► Give details below

 Provide a copy of the 2 most recent payslips from each employer.

1 Person working for this employer

You Your partner

Employer's name

Address

Postcode

Phone number (including area code)

Australian Business Number (ABN)

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

Is this work:

Full-time Part-time Seasonal Casual

Personnel, service or clock-card number

Hours worked per fortnight

 per fortnight

Gross amount paid per fortnight (before tax and other deductions)

\$ per fortnight

Are you paid the same amount each pay day?

No Yes



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Continued

2 Person working for this employer

You Your partner

Employer's name

Address

Postcode

Phone number (including area code)

Australian Business Number (ABN)

Is this work:

Full-time Part-time Seasonal Casual

Personnel, service or clock-card number

Hours worked per fortnight per fortnight

Gross amount paid per fortnight (before tax and other deductions) \$ per fortnight

Are you paid the same amount each pay day?

No Yes

If you need more space, provide a separate sheet with details.

9 Read this before answering the following question.

Fringe benefits – means a benefit received as part of employment income but not as a wage or salary.


Do you (and/or your partner) get any fringe benefits provided by an employer?

Include:

- use of a car as part of a salary package
- rent/mortgage paid
- home phone
- school fees for children
- child care expenses paid
- health insurance premiums.

No Go to next question

Yes

 Provide a copy of the details that show the type of fringe benefit, its value and if the amount is 'grossed up' or not 'grossed up'.

10 Are you (and/or your partner) **completing this form to claim** one of the following payments:

- Carer Payment
- Disability Support Pension (including Disability Support Pension Blind if claiming Rent Assistance)
- Farm Household Allowance?

No Go to 12

Yes Go to next question

11 Read this before answering the following question.

Seasonal work is work that is available for part or parts of the year at approximately the same time each year.

Contract work is any intermittent work that is performed under a contract for a specific function and/or period including sub-contract work.


Intermittent work is work that is available from time to time. This includes work that:

- can reasonably be predicted to end or not be available for a period
- is less than one year in duration and does not accrue leave entitlements.

In the last 6 months, have you (and/or your partner) done any seasonal, contract or intermittent work?

No Go to 16

Yes

 You will need to complete and return a **Seasonal, Contract and Intermittent Work Details (SU496)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms

▶ Go to 16

12 Are you (and/or your partner) **receiving** one of the following payments:

- Austudy
- Disability Support Pension (including Disability Support Pension Blind claiming Rent Assistance)
- Farm Household Allowance
- JobSeeker Payment
- Parenting Payment
- Youth Allowance?

No Go to 16

Yes Go to next question

13 In the last 12 months, have you (and/or your partner) stopped working for any employers (including self-employment)?

No Go to next question

Yes Give details below



Provide documents which confirm:

- that you (and/or your partner) stopped work (for example, **Employment Separation Certificate (SU001)** form or letter from the employer), or
- your (and/or your partner's) business has stopped trading.

If you do not have this form, go to servicessaustralia.gov.au/forms

1 Employer or business name

Australian Business Number (ABN)

Who works for this employer? You Your partner

2 Employer or business name

Australian Business Number (ABN)

Who works for this employer? You Your partner

If you need more space, provide a separate sheet with details.

14 In the last 12 months, have you (and/or your partner) received or expect to receive, any leave entitlement payments from an employer?

Include:

- annual leave
- maternity leave
- long service leave or sick leave you received when you stopped work
- entitlements that you cashed in before you stopped work
- money in a long service leave fund or scheme that you have not cashed in.

No Go to next question

Yes Give details in the next column



Provide documents which confirm each leave entitlement payment (for example, **Employment Separation Certificate (SU001)** form or letter from the employer).

If you do not have this form, go to servicessaustralia.gov.au/forms

Continued

1 Type of leave entitlement payment

Amount (before tax and other deductions)

Number of working days covered by the payment

Date paid or date payable (DD MM YYYY)

Leave entitlement for

You Your partner

Employer's details

Name of business

Australian Business Number (ABN)

Phone number (including area code)

2 Type of leave entitlement payment

Amount (before tax and other deductions)

Number of working days covered by the payment

Date paid or date payable (DD MM YYYY)

Leave entitlement for

You Your partner

Employer's details

Name of business

Australian Business Number (ABN)

Phone number (including area code)

If you need more space, provide a separate sheet with details.

15 Have you (and/or your partner) received a redundancy payment in the last 2 years?

No Go to next question

Yes



Provide documents which confirm any redundancy payments (for example, **Employment Separation Certificate (SU001)** form or letter from the employer).

If you do not have this form, go to servicessaustralia.gov.au/forms

Business interests

- 16 Are you (and/or your partner) involved in any type of business?

Include:

- farming
- self-employed
- sole trader
- partnership
- sub-contractor.

For more information, go to servicessaustralia.gov.au/businessypes

No Go to next question

Yes

 You will need to complete and return a **Business details (Mod F)** form. If the business owns real estate you will also need to complete and return a **Real estate details (Mod R)** form for each property.
If you do not have these forms, go to servicessaustralia.gov.au/forms

- 17 **Read** this before answering the following question.

You (and/or your partner) may be, or have been involved in a trust as:

- a trustee
- an appointor
- a beneficiary

or have:

- made a loan to a private trust
- made a gift of cash, assets, or private property to a private trust in the last 5 years
- relinquished involvement in a private trust in the last 5 years
- a private annuity
- a life interest
- an interest in a deceased estate.

A private trust includes a non-complying Self Managed Superannuation Fund (SMSF) or a non-complying Small Australian Prudential Regulation Authority (APRA) Fund (SAF).

For more information, go to servicessaustralia.gov.au/trustsandcompanies

Are you or have you (and/or your partner) been involved in a private trust in any of the ways detailed above?


No Go to 23

Yes Go to next question

- 18 Is the private trust now vested?

No Go to 20

Yes

 You will need to provide a copy of evidence of the vesting.
▶ Go to next question

- 19 Have you (and/or your partner) made any type of gift involving a private trust (either active or vested) in the last 5 years?

Include:

- forgiving a loan
- transfer of assets to or from a trust for less than their value
- forgoing distributions.

No Go to 23

Yes Go to next question


- 20 Have you completed a **Private Trust (Mod PT)** form or a **Special Disability Trust (Mod SDT)** form in the last 5 years?

No Go to next question

Yes Go to 22

- 21 Is the private trust a Special Disability Trust (SDT)?

No


 You will need to complete and return a **Private Trust (Mod PT)** form.
If you do not have this form, go to servicessaustralia.gov.au/forms
▶ Go to 23

Yes

 You will need to complete and return a **Special Disability Trust (Mod SDT)** form.
If you do not have this form, go to servicessaustralia.gov.au/forms
▶ Go to 23

- 22 Have you provided us with a copy of the most recent Income Tax Return and financial statements for the trust?

No

 Provide copies of the most recent Income Tax Return and financial statements for the trust?
▶ Go to next question

Yes Go to next question

23 Read this before answering the following question.

You (or your partner) may be, or have been in the last 5 years:

- a director of a company
- a shareholder of a company

or have:

- made a loan to a private company
- transferred shares in a private company
- made a gift of cash, assets or property to a private company.

For more information, go to servicesaustralia.gov.au/trustsandcompanies

Are you or have you (and/or your partner) been involved with a private company in any of the ways detailed above?

No Go to 28

Yes Go to next question

24 Is the private company now deregistered with the Australian Securities and Investments Commission (ASIC)?

No Go to 26

Yes You will need to provide a copy of evidence of deregistration.

▶ Go to next question

25 Have you (and/or your partner) made any type of gift involving a private company (either registered or deregistered) in the last 5 years?

Include:

- forgiving a loan
- transfer of assets to or from a private company for less than their value
- forgoing distributions.

No Go to 28

Yes Go to next question

26 Have you completed a **Private Company (Mod PC)** form in the last 5 years?

No You will need to complete and return a **Private Company (Mod PC)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms

▶ Go to 28

Yes Go to next question

27 Have you provided us with a copy of the most recent Income Tax Return and financial statements for the company?

No Provide copies of the most recent Income Tax Return and financial statements for the company.

▶ Go to next question

Yes Go to next question

Compensation

28 Read this before answering the following question.

Compensation, insurance and damages include:

- workers' compensation
- motor vehicle
- criminal injuries/victims compensation
- sporting injury
- public liability
- medical negligence
- personal accident and sickness insurance policies not paid from a superannuation fund
- income replacement insurance.

Have you (and/or your partner) ever:

- received
- claimed, or
- been able to claim

compensation, insurance and/or damages?

No Go to 30

Yes Go to next question

29 Have you (and/or your partner) told us about this before?

No You will need to complete and return a **Compensation and damages (Mod C)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms

▶ Go to next question

Yes Go to next question

30 Do you (and/or your partner) receive payments from an accident, sickness or income protection policy paid from a superannuation fund?

No Go to next question

Yes Provide a copy of the policy document and the latest statement for this policy.

Other money received

31 Do you (and/or your partner) receive payments from outside Australia?

Include:


- pensions from other countries
- benefits
- allowances
- superannuation
- compensation
- war related payments.

You must include details of pensions, allowances and other payments even if:

- they are not taxable in the country of payment, and/or
- you have arranged for your payment to be made to a third party.

No Go to next question

Yes Give details below

 Provide a copy of the document (for example, latest pension certificate – not a bank statement) from the issuing authority or agency which gives details including the amount in the foreign currency for each payment.

1 Type of payment

Country which pays it?

Who pays it?

Date commenced (if known)

 (DD MM YYYY)

Paid to:

You Your partner

2 Type of payment

Country which pays it?

Who pays it?

Date commenced (if known)

 (DD MM YYYY)

Paid to:

You Your partner

If you need more space, provide a separate sheet with details.

32 Do you (and/or your partner) receive money from any boarders or lodgers living with you?

Include boarders or lodgers who live with you or in accommodation at the property you live in (for example, renting out a room, granny flat).

Do not include immediate family members (for example, child, parent or guardian).

No Go to next question

Yes Give details below

1 Name of person

Relationship to you

Number of meals

you provide each day

Amount paid per fortnight

 \$

Date started paying (DD MM YYYY)

Your share % Partner's share %

2 Name of person

Relationship to you

Number of meals

you provide each day

Amount paid per fortnight

 \$

Date started paying (DD MM YYYY)

Your share % Partner's share %

If you need more space, provide a separate sheet with details.

33 Did you enter care accommodation on or after 1 January 2017 and are renting out your former home?

No Go to next question

Yes

 You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to servicesaustralia.gov.au/forms
▶ Go to next question

34 In the last 12 months, have you (and/or your partner) received a lump sum payment that you have not already told us about on this form?

Include:

- lump sum arrears of a periodic payment such as income protection payments.

Do not include:

- compensation
- insurance
- damages
- funding from the National Disability Insurance Scheme.

No Go to next question

Yes Give details below

1 Type of lump sum

Who paid it?

Amount paid

\$

Date paid (DD MM YYYY)

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

Who received this lump sum payment? You Your partner

2 Type of lump sum

Who paid it?

Amount paid

\$

Date paid (DD MM YYYY)

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

Who received this lump sum payment? You Your partner

If you need more space, provide a separate sheet with details.

Bank accounts

35 Give details of all accounts held by you (and/or your partner) in banks, building societies or credit unions.

Include:

- savings accounts
- cheque accounts
- term deposits
- joint accounts
- accounts you hold in trust or under any other name
- credit cards with a positive balance
- money held in church or charitable development funds.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do not include:

- shares
- managed investments
- an account used exclusively for funding from the National Disability Insurance Scheme.

1 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share %

Partner's share %

2 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share %

Partner's share %

Continued

3 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account Currency if not AUD

Your share % Partner's share %

4 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account Currency if not AUD

Your share % Partner's share %

5 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account Currency if not AUD

Your share % Partner's share %

6 Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account Currency if not AUD

Your share % Partner's share %

If you need more space, provide a separate sheet with details.

Assets

36 What is your estimate of the current market value of your (and/or your partner's) household contents and personal effects?

The **current market value** is the price that you would expect to get if you sold the item. It is not the replacement or insured value.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use and hobby collections (for example, stamps, coins).

Do not include:

- fixtures such as stoves and built-in items.

| | |
|-----------------------------------|--|
| Current market value | Balance of loan(s) taken to purchase |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

37 Do you (and/or your partner) own, partly own or have a financial interest in any motor vehicles, motor cycles or trailers?

No Go to next question

Yes Give details below

1 Type of asset (for example, car) Make (for example, Ford)

Model (for example, Focus) Year

| | |
|-----------------------------------|--|
| Current market value | Balance of loan(s) taken to purchase |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

2 Type of asset (for example, car) Make (for example, Ford)

Model (for example, Focus) Year

| | |
|-----------------------------------|--|
| Current market value | Balance of loan(s) taken to purchase |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

If you need more space, provide a separate sheet with details.

38 Do you (and/or your partner) own, partly own or have a financial interest in any boats or caravans/motor homes?

Do not include a boat or caravan that you live in.

No **Go to next question**

Yes **Give details below**

| | |
|---|---|
| 1 Type of asset (for example, boat) | Make (for example, Quintrex) |
| <input type="text"/> | <input type="text"/> |
| Model (for example, Coastrunner) | Year |
| <input type="text"/> | <input type="text"/> |
| Current market value | Balance of loan(s) taken to purchase |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

| | |
|--|---|
| 2 Type of asset (for example, caravan) | Make (for example, Jayco) |
| <input type="text"/> | <input type="text"/> |
| Model (for example, Heritage) | Year |
| <input type="text"/> | <input type="text"/> |
| Current market value | Balance of loan(s) taken to purchase |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

If you need more space, provide a separate sheet with details.

39 Do you (and/or your partner) own, or are buying, or have a life interest in your home?

A life interest means you have the right to reside in your home for life.

No **Go to 43**

Yes **Go to next question**

40 Is the home on a block of land larger than 2 hectares (5 acres)?

No **Go to next question**

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to servicesaustralia.gov.au/forms **Go to 42**

41 Does the property that you (and/or your partner) live on have more than one title document?

No **Go to next question**

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to servicesaustralia.gov.au/forms

42 Is any part of the home property used for income producing purposes?

Do not include rent from boarders or lodgers.

No **Go to next question**

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to servicesaustralia.gov.au/forms

43 Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia?

No **Go to 45**

Yes **Go to next question**

44 How many other properties in and/or outside Australia do you (and/or your partner) own or have an interest in?

 You will need to complete and return a **Real estate details (Mod R)** form for each property. If you do not have this form, go to servicesaustralia.gov.au/forms

Superannuation

45 Read this before answering the following question.

The Age Pension age is 67. Answer this question **only** if you (and/or your partner) are Age Pension age or claiming Age Pension otherwise, **Go to 46**

Do you (and/or your partner) have any money invested in superannuation in Australia where the fund is not paying a pension?

Include:

- superannuation funds such as:
 - retail
 - industry
 - corporate
 - employer
 - public sector
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

Do not include superannuation if the owner is under Age Pension age, unless they are lodging an early claim for Age Pension.

SPIN code – is commonly used for fund managers to identify superannuation products.

No Go to next question

Yes Give details below



Provide a copy of the latest statements for superannuation funds and retirement savings accounts. Statements must include a breakdown of your superannuation investment portfolio. If you have a SMSF or SAF, provide the financial statement including income tax return and member statement.

Do not include printouts of online balances.

1 Name of institution/fund manager or SPIN code

Name of fund

Product reference number Current market value

 \$

Date of joining/investment (DD MM YYYY)

Owned by: You Your partner

Continued

2 Name of institution/fund manager or SPIN code

Name of fund

Product reference number Current market value

 \$

Date of joining/investment (DD MM YYYY)

Owned by: You Your partner

If you need more space, provide a separate sheet with details.

46 Read this before answering the following question.

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a retirement savings account
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF).

Types of income streams include:

- account-based pension (also known as allocated pension)
- market-linked pension (also known as term allocated pension)
- lifetime income stream
- pooled lifetime income stream
- life expectancy income stream
- term income stream
- defined benefit pension (for example, public sector and private sector defined benefit pensions)
- military invalidity pension (for example, invalidity pensions from the Defence Force Retirement and Death Benefits or Military Superannuation and Benefits schemes).

Do you (and/or your partner) receive income from any Australian income stream products?

No Go to next question

Yes Give details in the next column



For each income stream product, you (and/or your partner) will need to provide:

- a Centrelink/Department of Veterans' Affairs (DVA) schedule or similar schedule, or
- a **Details of income stream product (SA330)** form.

The schedule or form must be completed by:

- your product provider
- the trustee of the SMSF or SAF, or
- the SMSF administrator.

If you do not have this form, go to **servicesaustralia.gov.au/forms**

Continued

1 Name of product provider/SMSF/SAF

Type of income stream

Product reference number

Commencement date (DD MM YYYY)

Owned by: You Your partner

2 Name of product provider/SMSF/SAF

Type of income stream

Product reference number

Commencement date (DD MM YYYY)

Owned by: You Your partner

If you need more space, provide a separate sheet with details.

Financial assets

47 Do you (and/or your partner) own any shares, options, rights, convertible notes or other securities **listed** on a stock/securities exchange in and/or outside Australia?

Include:


- futures
- options
- derivatives
- rights
- convertible notes.

Do not include:

- managed investments
- investments purchased with a margin loan.

No Go to next question

Yes Give details below

 Provide a copy of the latest statement detailing the shareholding in each company.

1 Name of the public company or ASX code

| | |
|-----------------------------------|--|
| Number of shares held | Country if not Australia |
| <input type="text"/> | <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

2 Name of the public company or ASX code

| | |
|-----------------------------------|--|
| Number of shares held | Country if not Australia |
| <input type="text"/> | <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

3 Name of the public company or ASX code

| | |
|-----------------------------------|--|
| Number of shares held | Country if not Australia |
| <input type="text"/> | <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

4 Name of the public company or ASX code

| | |
|-----------------------------------|--|
| Number of shares held | Country if not Australia |
| <input type="text"/> | <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

If you need more space, provide a separate sheet with details.


48 Do you (and/or your partner) own any shares, options or rights in public companies, **not listed** on a stock exchange?

Do not include:

- managed investments
- investments purchased with a margin loan.

No Go to next question

Yes Give details below

 Provide a copy of the latest statement or document that shows the number of shares held.

1 Name of public company

| | |
|----------------------|----------------------|
| Type of shares | Number of shares |
| <input type="text"/> | <input type="text"/> |

| | | |
|-------------------------|------------------------|------------------------|
| Current market value | Your share | Partner's share |
| \$ <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

2 Name of public company

| | |
|----------------------|----------------------|
| Type of shares | Number of shares |
| <input type="text"/> | <input type="text"/> |

| | | |
|-------------------------|------------------------|------------------------|
| Current market value | Your share | Partner's share |
| \$ <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

3 Name of public company

| | |
|----------------------|----------------------|
| Type of shares | Number of shares |
| <input type="text"/> | <input type="text"/> |

| | | |
|-------------------------|------------------------|------------------------|
| Current market value | Your share | Partner's share |
| \$ <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

If you need more space, provide a separate sheet with details.

49 Do you (and/or your partner) own any managed investments in and/or outside Australia?

Include:

- investment trusts
- personal investment plans
- life insurance bonds
- friendly society bonds.


Do not include:

- conventional life insurance policies
- funeral bonds
- superannuation or rollover investments
- investments purchased with a margin loan.

APIR code – is commonly used for fund managers to identify individual financial products.

No Go to next question

Yes Give details below

 Provide a copy of the document which gives current details for each investment (for example, certificate with number of units or account balance).

1 Name of company

Name of product and product option

| | |
|--------------------------------------|----------------------|
| Number of units held (if applicable) | APIR code (if known) |
| <input type="text"/> | <input type="text"/> |

| | |
|-------------------------|----------------------|
| Value of the investment | Currency if not AUD |
| <input type="text"/> | <input type="text"/> |

| | |
|-----------------------------------|--|
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |
|-----------------------------------|--|

2 Name of company

Name of product and product option

| | |
|--------------------------------------|----------------------|
| Number of units held (if applicable) | APIR code (if known) |
| <input type="text"/> | <input type="text"/> |

| | |
|-------------------------|----------------------|
| Value of the investment | Currency if not AUD |
| <input type="text"/> | <input type="text"/> |


| | |
|-----------------------------------|--|
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |
|-----------------------------------|--|

If you need more space, provide a separate sheet with details.

50 Do you (and/or your partner) own any managed investments or securities purchased with a margin loan?

No Go to next question

Yes Give details below

 Provide a copy of the latest statement detailing your margin loan(s) for each investment.

1 Name of margin loan company

Current portfolio value

APIR code (if known)

\$

Your share

%

Partner's share

%

2 Name of margin loan company

Current portfolio value

APIR code (if known)

\$

Your share

%

Partner's share

%

If you need more space, provide a separate sheet with details.

51 Do you (and/or your partner) own any bonds or debentures in and/or outside Australia?


Bonds refer to government and semi-government bonds.

Do not include:

- friendly society bonds
- funeral bonds
- life insurance bonds
- accommodation bonds for residing in an aged care facility.

No Go to next question

Yes Give details below

 Provide a copy of the document which gives details for each bond or debenture.

1 Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share

%

Partner's share

%

2 Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share

%

Partner's share

%

3 Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share

%

Partner's share

%

If you need more space, provide a separate sheet with details.

Loans and gifts


52 Have you (and/or your partner) lent money to another person or organisation?

Include all loans, whether they are made to family members, other people or organisations or trusts.

Do not include loans to secure accommodation in retirement villages or aged care.

No Go to next question

Yes Give details below

 Provide a copy of the document which gives details for each loan (if available).

1 Who did you lend the money to?

Date lent (DD MM YYYY)

Amount lent \$ Current balance on loan \$

Lent by you % Lent by your partner %

2 Who did you lend the money to?

Date lent (DD MM YYYY)

Amount lent \$ Current balance on loan \$


Lent by you % Lent by your partner %

If you need more space, provide a separate sheet with details.

53 In the last 12 months, have you (and/or your partner) taken out a Reverse Mortgage or Home Equity Conversion Loan against your home?

No Go to next question

Yes Give details below

 Provide a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

If you need more space, provide a separate sheet with details.

54 In the last 5 years, have you (and/or your partner) given away, sold for less than their market value or surrendered a right to any cash, assets, property or income?

Include:

- forgiven loans
- shares in private companies
- transfer of business or farm ownership.

No Go to next question

Yes Give details below

1 What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth \$ What you got for it \$

Your share % Partner's share % Was this gift to a Special Disability Trust (SDT)? No Yes

2 What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth \$ What you got for it \$

Your share % Partner's share % Was this gift to a Special Disability Trust (SDT)? No Yes

3 What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth \$ What you got for it \$

Your share % Partner's share % Was this gift to a Special Disability Trust (SDT)? No Yes


If you need more space, provide a separate sheet with details.

Funeral arrangements and life insurance

55 Do you (and/or your partner) have any funeral bonds/ funeral investments, including a pre-paid funeral?

No **Go to 57**

Yes Give details below

 Provide a copy of the document which gives details for each bond or investment, such as a purchase contract outlining the investment terms and a bank statement showing the purchase price.

1 Name of company

Name of product

Purchase price including instalments but not interest Current value as per latest statement

\$ \$

Your share % Partner's share %

2 Name of company

Name of product

Purchase price including instalments but not interest Current value as per latest statement

\$ \$

Your share % Partner's share %

If you need more space, provide a separate sheet with details.

56 Do you (and/or your partner) have a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No **Go to next question**

Yes  Provide a copy of each contract.

57 Do you (and/or your partner) have a life insurance policy that can be cashed in?

Include:


- policies with a surrender value (for example, whole of life, paid up and endowment policies).

Do not include:

- friendly society bonds
- life insurance bonds
- details of home, contents, car, mortgage or similar policies.

No **Go to next question**

Yes Give details below

 Provide a copy of the policy document and the latest statement for each policy.

1 Name of insurance company

Policy number

Surrender value

\$

Your share % Partner's share %

2 Name of insurance company

Policy number

Surrender value

\$

Your share % Partner's share %

If you need more space, provide a separate sheet with details.

Other income and assets

58 Do you (and/or your partner) receive any payments that you have not already told us about on this form?

Include:


- Department of Veterans' Affairs (DVA) payments
- Self-Employment Allowance
- gratuities
- match or sporting payments
- non-monetary payments for services
- scholarships, educational assistance or allowance
- any other income.

Do not include:

- funding from the National Disability Insurance Scheme (NDIS)
- Parental Leave Pay
- Dad and Partner Pay.

No Go to next question

Yes Give details below

 Provide a copy of the most recent statement or certificate that gives details for each type of payment.

1 Type of payment

Who pays it?

Amount per fortnight

\$

Date commenced (if known)

(DD MM YYYY)

Your share % Partner's share %

2 Type of payment

Who pays it?

Amount per fortnight

\$

Date commenced (if known)

(DD MM YYYY)

Your share % Partner's share %

If you need more space, provide a separate sheet with details.

59 Do you (and/or your partner) own any other assets (in or outside Australia) that you have not already told us about on this form?

Include:

- taxi plates
- time share
- racehorses
- greyhounds
- travellers cheques
- crypto currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting)
- water assets including rights, allocations or licences not associated with land owned by you (and/or your partner).

Do not include an account used exclusively for funding from the NDIS.

No Go to next question

Yes Give details below

1 Description of asset

| | |
|----------------------|---|
| | Balance of loan(s) taken to purchase |
| Current market value | <input type="text"/> |

| | | |
|---------------------|------------------------|------------------------|
| | Your share | Partner's share |
| Currency if not AUD | <input type="text"/> % | <input type="text"/> % |

2 Description of asset

| | |
|----------------------|---|
| | Balance of loan(s) taken to purchase |
| Current market value | <input type="text"/> |

| | | |
|---------------------|------------------------|------------------------|
| | Your share | Partner's share |
| Currency if not AUD | <input type="text"/> % | <input type="text"/> % |

If you need more space, provide a separate sheet with details.

Checklist

- 60** Which of the following forms and/or documents are you (and/or your partner) providing with this form?

You must provide **copies** of documents. The copies will not be returned.

If you are not sure, check the question to see if you should provide the documents.

Tick all that apply

| | |
|---|--------------------------|
| Copies of the 2 most recent payslips from each employer (If you answered Yes at question 8) | <input type="checkbox"/> |
| Copies of documents with details of the fringe benefits (If you answered Yes at question 9) | <input type="checkbox"/> |
| Seasonal, Contract and Intermittent Work Details (SU496) form (If you answered Yes at question 11) | <input type="checkbox"/> |
| Employment Separation Certificate (SU001) form, letter from the employer or documents confirming your business has stopped trading (If you answered Yes at question 13) | <input type="checkbox"/> |
| Employment Separation Certificate (SU001) form or letter from the employer (If you answered Yes at question 14 or 15) | <input type="checkbox"/> |
| Business details (Mod F) form and Real estate details (Mod R) form for each property (If you answered Yes at question 16) | <input type="checkbox"/> |
| Copy of evidence of the vesting (If you answered Yes at question 18) | <input type="checkbox"/> |
| Private Trust (Mod PT) form (If you answered No at question 21) | <input type="checkbox"/> |
| Special Disability Trust (Mod SDT) form (If you answered Yes at question 21) | <input type="checkbox"/> |
| Copies of the most recent Income Tax Return and financial statements for the trust (If you answered No at question 22) | <input type="checkbox"/> |
| Copy of evidence of deregistration (If you answered Yes at question 24) | <input type="checkbox"/> |
| Private Company (Mod PC) form (If you answered No at question 26) | <input type="checkbox"/> |
| Copies of the most recent Income Tax Return and financial statements for the company (If you answered No at question 27) | <input type="checkbox"/> |
| Compensation and damages (Mod C) form (If you answered No at question 29) | <input type="checkbox"/> |
| Copy of income protection policy document and the latest statement (If you answered Yes at question 30) | <input type="checkbox"/> |

Continued

| | |
|--|--------------------------|
| Copies of documents with details of payments from outside Australia (If you answered Yes at question 31) | <input type="checkbox"/> |
| Real estate details (Mod R) form (If you answered Yes at question 33, 40, 41, and/or 42 or if required at question 44) | <input type="checkbox"/> |
| Copies of the latest statements for superannuation funds and retirement savings accounts. Do not include printouts of online balances. For SMSF and SAFs, copies of financial statements including income tax returns and member statements (If you answered Yes at question 45) | <input type="checkbox"/> |
| A Centrelink/DVA schedule or similar schedule or a Details of income stream product (SA330) form (If you answered Yes at question 46) | <input type="checkbox"/> |
| Copies of the latest statement for each shareholding listed on a stock/securities exchange (If you answered Yes at question 47) | <input type="checkbox"/> |
| Copies of the latest statement for each shareholding not listed on a stock exchange (If you answered Yes at question 48) | <input type="checkbox"/> |
| Copies of managed investment certificates or similar documents (If you answered Yes at question 49) | <input type="checkbox"/> |
| Copies of the latest statement for margin loans for each investment (If you answered Yes at question 50) | <input type="checkbox"/> |
| Copies of investment documents for each bond or debenture (If you answered Yes at question 51) | <input type="checkbox"/> |
| Copies of money on loan documents (if available) (If you answered Yes at question 52) | <input type="checkbox"/> |
| Copy of the loan agreement or contract (If you answered Yes at question 53) | <input type="checkbox"/> |
| Copy of document with details of each bond or investment (If you answered Yes at question 55) | <input type="checkbox"/> |
| Copies of funeral service contract (If you answered Yes at question 56) | <input type="checkbox"/> |
| Copies of insurance policy documents and latest statements (If you answered Yes at question 57) | <input type="checkbox"/> |
| Copy of the most recent statement or certificate that gives details for each type of payment (If you answered Yes at question 58) | <input type="checkbox"/> |

Privacy notice

61 You (and your partner) need to read this

Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to servicessaustralia.gov.au/privacypolicy

Declaration

62 I declare that:

- the information I have provided in this form is complete and correct.

I understand that:

- if submitting this document as part of a claim, the claim may not be accepted unless supporting documents are lodged at the same time as the claim. The only exception will be if I am waiting for medical evidence or other documents from a third party
- Services Australia can make relevant enquiries to make sure I receive the correct entitlement
- giving false or misleading information is a serious offence.

Your signature



Date (DD MM YYYY)

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
|--|--|--|--|--|--|

Partner's signature



Date (DD MM YYYY)

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
|--|--|--|--|--|--|

Returning this form

Return this form and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to servicessaustralia.gov.au/centrelinkuploaddocs
- in person at one of our service centres.