

# Tax and Superannuation Refund Application Form

Please print in **BLOCK CAPITALS**

Simply:

1. Complete these forms
2. Attach any Payment Summaries / Payslips
3. Scan and email to [info@supertaxrefunds.com.au](mailto:info@supertaxrefunds.com.au) or fax to (03) 8679 3343 in Australia or International +61 38679 3343. Any questions please call 1800 117 405 or +61 7 553 993 61



## 1. PERSONAL INFORMATION

Mr Mrs Ms Miss

First Name: .....

Middle Name(s): .....

Family Name: .....

Date of Birth: .....

Country of Residence: .....

Telephone: .....

Mobile: .....

Email: .....

Address: .....

Occupation: .....

## 2. STATUS INFORMATION

Date of Arrival in Australia: .....

Date of Departure from Australia: .....

Tax File Number: .....

ABN: .....

Visa Type: .....

Have you lodged a tax refund in Australia before? .....

## 3. REFUND PAYMENT OPTIONS (Please circle a, b or c)

- a. Post to above address
- b. Deposit to Australian Bank Account
- c. Deposit refund to non-Australian Bank Account

**If you are leaving Australia and plan to close your Australian bank account please provide your international bank details**

Account Name: .....

BSB: .....

ACCOUNT NUMBER: .....

Complete below for non-Australian bank: .....

IBAN / BRANCH CODE: .....

SWIFT / BIC: .....

BRANCH STREET ADDRESS: .....

## 4. EMPLOYMENT INFORMATION – HOW MANY JOBS DID YOU HAVE? .....

Company name: .....

City: .....

Phone: .....

Email: .....

Do you have a PAYG/final payslip? .....

If no, would you like us to source replacements\*?: .....

Date started: .....

Date Finished: .....

Superannuation Fund Name: .....

Member Number: .....

## 5. EMPLOYMENT INFORMATION

Company name: .....

City: .....

Phone: .....

Email: .....

Do you have a PAYG/final payslip? .....

If no, would you like us to source replacements\*?: .....

Date started: .....

Date Finished: .....

Superannuation Fund Name: .....

Member Number: .....

If you have more than 2 employers, please include information on a separate page.

\* Document retrieval fee applies

## 6. DEDUCTIONS – List all work related deductions. E.g. Travel expenses, telephone, clothing, etc.

.....

.....

.....

.....

## 7. SUPERANNUATION DETAILS

You must have left Australia and your visa has expired to claim your superannuation refund. Please allow up to 2 months for money to be refunded after your visa has expired.

Please attach CLEAR PHOTOCOPIES of the following:

- |                          |                                 |                          |   |
|--------------------------|---------------------------------|--------------------------|---|
| <input type="checkbox"/> | Passport Photo page             | <input type="checkbox"/> | Australian Passport departure stamp                 |
| <input type="checkbox"/> | Australian Visa details         | <input type="checkbox"/> | 2 forms of ID 9Drivers licence, University Card etc |
| <input type="checkbox"/> | Australian Passport entry stamp | <input type="checkbox"/> | Any superannuation fund statements, member card etc |

## POWER OF ATTORNEY AND DECLARATION OF REPRESENTATIVE

Please only fill out the fields where you see the **x** indicated

### Taxpayer:

Name: **x** \_\_\_\_\_

Tax File Number: **x** \_\_\_\_\_ Date of birth: **x** \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Hereby appoint the following representative as attorney- in fact:

### Super Tax Refunds Australia – ABN 41 138 084 769

Shop 22, 9 Beach Rd, Surfers Paradise, QLD, 4217, Australia

Telephone +61 7 553 993 61 Fax Number +61 3 8679 3343

to act as the taxpayer's legal representative for the following matters:

#### All matters concerning Australian Income Tax and Superannuation

Acts authorised:

The representative is authorised 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) the group certificate, superannuation details or TFN; and
- B) Obtaining information from any superannuation fund of which I, the taxpayer, may be a member in relation to any benefit to which I may be entitled; and
- C) Signing any agreements, consents or other documents (including superannuation claim forms) required to refund any overpaid taxes or facilitate the payment of any superannuation benefits; and
- D) Requesting my tax assessment prior to the end of the financial year and arranging the refund (including superannuation funds) to be sent to the bank account of my representative.

I agree to and accept the terms and conditions of service as written online at [www.supertaxrefunds.com.au](http://www.supertaxrefunds.com.au) and to any changes in the terms and conditions which Super Tax Refunds Australia may affect from time to time, and to the fees of the agent which represents the services I have requested and which are provided by Super Tax Refunds Australia and/or its affiliate companies.

I understand that once my refund is processed, I will be contacted by the Agent with regard to payment options for receiving my refund and will be able to provide my bank details.

I declare that the information provided is true and correct.

### TAXPAYER

Signature: **x** \_\_\_\_\_ Date: **x** \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Print name: **x** \_\_\_\_\_

### For Super Tax Refunds Australia 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 authorised by the individual to give the information in this document to the Commissioner.

### Super Tax Refunds Australia ACCOUNTANT:

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

Print name: \_\_\_\_\_

Super Tax Refunds Australia MANAGER – \_\_\_\_\_ :

## RESIDENCY QUESTIONNAIRE

Please provide as much information as possible

Please read and carefully answer the following questions so we can determine whether you are treated as a resident for Australian tax purposes.

1. Are you migrating and settling in Australia? .....
2. Are you an Australian returning to live? .....
3. Have you stayed or do you intend to stay in Australia for six months or more? .....
4. Have you stayed or do you intend to stay in a particular place continuously for six months or more? .....
5. What is your main purpose for being in Australia? (Please circle)
  - a. employment contract or permanent employment
  - b. exchange program or full-time research
  - c. full-time education
  - d. holidaying or casual employment
  - e. visiting friends or relatives
  - f. other reasons
6. Where do you live while in Australia? (Please circle)
  - a. staying with friends, family
  - b. owning or buying a home
  - c. renting or leasing accommodation
  - d. hotel, motel, hostel or caravan
  - e. university campus
7. Do you have a spouse and / or dependent children? .....
8. Where do you hold the majority of your assets? .....
9. Are you a member of any clubs, churches, community groups or organisations in Australia? .....

## CUSTOMER AGREEMENT

Please only fill out the fields where you see the **x** indicated

### I confirm that:

1. I understand that Super Tax Refunds Australia is a trading name for the services of Total Wealth Concepts Australia Pty Ltd.
2. I have not filed and will not file an income tax return or apply for an income tax refund for the Australian tax year I have authorised Super Tax Refunds Australia to apply for and will not authorise any other party to do so on my behalf.
3. I have signed the necessary Power of Attorneys to authorise Super Tax refunds, referred to here after as the Agent, to prepare the Australian tax return and represent me before the Australian Tax Office (ATO).
4. I authorise the Agent to receive all correspondence from the ATO on my behalf.
5. I agree to and accept the terms and conditions of service as written online at [www.supertaxrefunds.com.au](http://www.supertaxrefunds.com.au) and to any changes in the terms and conditions which the Agent may affect from time to time, and to the fees of the Agent which represents the services I have requested and which are provided by the Agent and/or its affiliate companies.
6. I confirm that I have given the Agent all information needed and available to me and agree to co-operate and provide additional information as required at any stage of the tax refund process.
7. I commit to updating the Agent of any changes in my contact details.
8. I commit to the terms of this agreement with the Agent in Australia, under Australian law.

Signature: **x** \_\_\_\_\_ Date: **x** \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Print name: **x** \_\_\_\_\_ Tax File Number: **x** \_\_\_\_\_