



Income and assets

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.

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'.

This page has been left blank intentionally.



centrelink



Income and assets

Filling in this form

You can fill this form digitally in some browsers, or you can open it in Adobe Acrobat Reader. If you do not have Adobe Acrobat Reader, you can print this form and complete it.

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.

out you
Your Customer Reference Number (if known)
Your name Family name
First given name
Second given name
Your date of birth (DD MM YYYY)
Do you have a partner? No
Your partner's Customer Reference Number (if known)
Your partner's name Family name
First given name
Second given name

Employment related income

Are you (and/or your partner) currently paid or expecting to be paid any income from work?

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 Num	iber (ABN)	
Is this work:		
Full-time Part-time	Seasonal Casual	
Personnel, service or clock-card number		
Hours worked	nor fortnight	
per fortnight	per fortnight	
Gross amount paid per fortnight (before tax	\$ per fortnight	
and other deductions)		
Are you paid the same amount each pay day?		
No Yes		



CLK0Mod(iA) 2412

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 per fortnight)
and other deductions)
Are you paid the same amount each pay day?
No Yes
If you need more space, provide a separate sheet with details.
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

9

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.

Go to next question

Yes

2 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

Read this before answering the following question.

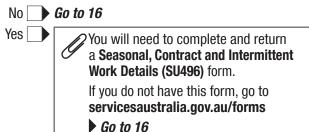
Seasonal work is work that is available for part or parts of the year at approximately the same time each year.

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 1 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?



- **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		st 12 months, have you (and/or your partner)		Continued
	stopped working for any employers (including self-employment)?			1 Type of leave entitlement payment
	No No	Go to next question		
		Give details below		Amount (before tax Number of working days and other deductions) covered by the payment
		Provide documents which confirm: • that you (and/or your partner) stopped work (for example Employment)		\$
		work (for example, Employment Separation Certificate (SU001) form or letter from the employer), or		Date paid or date payable (DD MM YYYY)
		your (and/or your partner's) business has stopped trading.		Leave entitlement for You Your partner Employer's details
		If you do not have this form, go to servicesaustralia.gov.au/forms		Name of business
	_			Australian Business Number (ABN)
	1 Emplo	oyer or business name		Dhone number (including area code)
	Australia	an Business Number (ABN)		Phone number (including area code)
				2 Type of leave entitlement payment
	Who works for this employer? You Your partner			Type of loave enduement payment
	2 Emplo	oyer or business name		Amount (before tax and other deductions) Number of working days covered by the payment
	Australia	an Business Number (ABN)		\$
				Date paid or date payable (DD MM YYYY)
		rks for this employer? You Your partner		Leave entitlement for You Your partner
	If you no	eed more space, provide a separate sheet with		Employer's details Name of business
14	In the las	st 12 months, have you (and/or your partner)		Australian Dusings Number (ADM)
	received	or expect to receive, any leave entitlement s from an employer?		Australian Business Number (ABN)
	Include:			Phone number (including area code)
	• annu	arrity 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. 			If you need more space, provide a separate sheet with details.
				uetalis.
			15	Have you (and/or your partner) received a redundancy payment in the last 2 years?
	No 📄	Go to next question		No Go to next question
	Yes Give details in the next column			Yes Provide documents which confirm any
		Provide documents which confirm each leave entitlement payment		redundancy payments (for example, Employment Separation Certificate
		(for example, Employment Separation		(SU001) form or letter from the employer).
		Certificate (SU001) form or letter from the employer).		If you do not have this form, go to servicesaustralia.gov.au/forms
		If you do not have this form, go to servicesaustralia.gov.au/forms		55. T. 5550 and analyst and 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

servicesaustralia.gov.au/businesstypes

Go to next question

Yes 📄

2 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 servicesaustralia.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
- relinguished 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

servicesaustralia.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

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**

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

No

2 You will need to complete and return a Private Trust (Mod PT) form.

If you do not have this form, go to servicesaustralia.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 servicesaustralia.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

2 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.

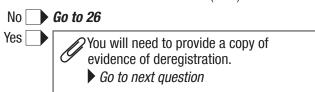
For more information, go to

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**

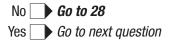
24 Is the private company now deregistered with the Australian Securities and Investments Commission (ASIC)?



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:

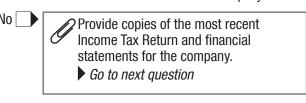
- · forgiving a loan
- transfer of assets to or from a private company for less than their value
- forgoing distributions.



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



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



Compensation

28 Read this before answering the following question.

Compensation, insurance and damages include:

· workers' compensation

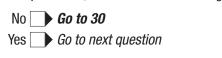
Yes Go to next question

- motor vehicle
- criminal injuries/victims compensation
- sporting injury
- public liability
- · medical negligence
- personal accident and sickness insurance
- income replacement insurance.

Have you (and/or your partner) ever:

- received
- · claimed, or
- · been able to claim

compensation, insurance and/or damages?

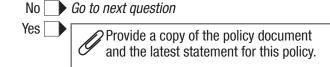


29 Have you (and/or your partner) told us about this before?



Yes Go to next question

30 Do you (and/or your partner) receive payments from an income protection policy?



Other money received

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

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)

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

%

Partner's share

%

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	Nou will need		

Your share

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

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) 1 Name of hank building society or credit union Who received this Your partner lump sum payment? You 2 Type of lump sum Who paid it? Amount paid Date paid (DD MM YYYY) Who received this Your partner You lump sum payment? If you need more space, provide a separate sheet with details.

Bank accounts

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.

Account number (this may not be your card number)		
Current balance		Currency
of account		if not AUD
Your share	%	Partner's %
2 Name of bank, building society or credit union		
Account number (this may not be your card number)		
Current balance Currency of account if not AUD		
Your share	%	Partner's %

Continued		
3 Name of bank, building s	ociety or credit union	
Account number (this may not be your card number)		
Current balance Currency of account if not AUD		
Your share %	Partner's %	
4 Name of bank, building s	ociety or credit union	
Account number (this may	not be your card number)	
Current balance of account	Currency if not AUD	
Your share %	Partner's %	
5 Name of bank, building s	ociety or credit union	
Account number (this may	not be your card number)	
Current balance of account	Currency if not AUD	
Your share %	Partner's %	
6 Name of bank, building s	ociety or credit union	
Account number (this may not be your card number)		
Current balance of account	Currency if not AUD	
Your share %	Partner's %	

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
\$	\$
Your share %	Partner's %

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

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
\$	\$
Your share %	Partner's %

2 Type of asset	Make
(for example, car)	(for example, Ford)
Model (for example, Focus)	Year
	Balance of loan(s) taken
Current market value	to purchase
\$	\$
Your share %	Partner's %

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

details.

Do you (and/or your partner) own, partly own or have a Does the property that you (and/or your partner) live on financial interest in any boats or caravans/motor homes? have more than one title document? Go to next auestion Do not include a boat or caravan that you live in. Yes You will need to complete and return a No Go to next question Real estate details (Mod R) form. Yes Give details below If you do not have this form, go to servicesaustralia.gov.au/forms 1 Type of asset Make (for example, boat) (for example, Quintrex) **42** Is any part of the home property used for income producing purposes? Year Model (for example, Coastrunner) Do not include rent from boarders or lodgers. Balance of loan(s) taken No Go to next question to purchase Current market value Yes You will need to complete and return a \$ Real estate details (Mod R) form. If you do not have this form, go to Partner's % % Your share servicesaustralia.gov.au/forms share 2 Type of asset Make (for example, caravan) (for example, Jayco) Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia? No **Go to 45** Model (for example, Heritage) Year Yes Go to next question Balance of loan(s) taken How many other properties in and/or outside Australia do to purchase Current market value you (and/or your partner) own or have an interest in? \$ \$ Partner's % % Your share share You will need to complete and return a Real estate details (Mod R) form for each property. If you need more space, provide a separate sheet with If you do not have this form, go to details. servicesaustralia.gov.au/forms 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 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

Superannuation

45 Read this before answering the following question.

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

To work out if you (or your partner) are Age Pension age, use the table below.

Date of birth Qualifying age at

1 January 1954 to

30 June 1955 66 years

1 July 1955 to

31 December 1956 66 years and 6 months

From 1 January 1957 67 years

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

employer

industry

public sector

- corporate

· 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 by 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		
\$		
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
\$
Ψ
Date of joining/investment
(DD MM YYYY)
,
Owned by: You Your partner
If you need more space, provide a separate sheet with
details.
1

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	η			
es Give details below				
	- (1) - (-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1			
	ppy of the latest statement			
company.	shareholding in each			
company.				
1 Name of the public com	pany or ASX code			
Number of charge hold	Country if not Australia			
Number of shares held	Country if not Australia			
V 1 0/	Partner's			
Your share % Name of the public com	share			
Tour onaro	share			
2 Name of the public com	share 96 pany or ASX code Country if not Australia			
Name of the public com Number of shares held	share 96 pany or ASX code Country if not Australia Partner's 97			
Name of the public com Number of shares held	share 90 pany or ASX code Country if not Australia			
Name of the public com Number of shares held	share 96 pany or ASX code Country if not Australia Partner's 96 share 96			
Name of the public com Number of shares held Your share	share 96 pany or ASX code Country if not Australia Partner's 96 share 96			
Name of the public com Number of shares held Your share % Name of the public com	share 90 pany or ASX code Country if not Australia Partner's 96 share 96 pany or ASX code			
Name of the public com Number of shares held Your share % Name of the public com	share 96 pany or ASX code Country if not Australia Partner's 96 share 96			
Name of the public com Number of shares held Your share % Name of the public com	share % pany or ASX code Country if not Australia Partner's % share % pany or ASX code			
Name of the public com Number of shares held Your share % Name of the public com Number of shares held	share 90 pany or ASX code Country if not Australia Partner's 96 pany or ASX code Country if not Australia Partner's 96 Partner's 96			
Name of the public com Number of shares held Your share % Name of the public com	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia			
Name of the public com Number of shares held Your share	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % Partner's %			
Name of the public com Number of shares held Your share % Name of the public com Number of shares held	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % Partner's %			
Name of the public com Number of shares held Your share	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % Partner's %			
Name of the public com Number of shares held Your share % Name of the public com Number of shares held Your share % Number of the public com Number of the public com	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % Partner's %			
Name of the public com Number of shares held Your share % Name of the public com Number of shares held Your share % Number of the public com Number of the public com	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % pany or ASX code pany or ASX code			
Name of the public com Number of shares held Your share	share % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % pany or ASX code Country if not Australia Partner's % Partner's %			

Do you (and/or your partnor rights in public compared	, -	-	49	Do you (and/or your painvestments in and/or o	,		d
	d with a margin lion w copy of the lates ent that shows th d.	et statement		Include: investment trusts personal investment life insurance bond friendly society bor Do not include: conventional life in funeral bonds superannuation or investments purch: APIR code — is commidentify individual fina	ls nds. surand rollove ased v	ce policies er investments with a margin loan. ised for fund manag	gers to
Type of shares	Nun	nber of shares		No ☐ Go to next que			
Type of shares	Null	inder of situates		Yes Give details be	elow		
Current market value	Your share	Partner's share		gives c	urrent	by of the document details for each inv certificate with nur	estmen
\$	%	%				unt balance).	
2 Name of public compa	any			1 Name of company			
Type of shares	Nun	nber of shares		Name of product and	produ	ct option	
Current market value	Your share %	Partner's share		Number of units held (if applicable)		APIR code (if know	/n)
		/	<u> </u>	Value of the investme	nt	Currency if not AU	D
Name of public compa	any		1				
Type of shares	Nun	nber of shares		Your share	%	Partner's share	%
Current market value	Your share	Partner's share		2 Name of company			
\$	%	%		Name of product and	produ	ct option	
If you need more space, details.	provide a separ	ate sheet with		Number of units held (if applicable)		APIR code (if know	/n)
				Value of the investmen	nt	Currency if not AU	D
				Your share	%	Partner's share	%
				If you need more spa details.	ce, pr	ovide a separate sl	neet wit

0	Do you (and/or your partner) own any manage investments or securities purchased with a man No Go to next question			n and/or o	outside	e Australia?	own any bonds and semi-gover	
	Yes Give details below			bonds.	יטו נטי	government	and semi-gover	IIIIIGIIL
	Provide a copy of the latest state	ement		Do not i				
	detailing your margin loan(s) for					ety bonds		
	investment.			• funera		is e bonds		
	1 Name of margin loan company				nmoda		or residing in a	ın aged care
	Current portfolio value APIR code (if kno	wn)		No D	30 to n	ext question		
	\$					etails below		
	Dortner's			.00 <u> </u>			of the decima	ما منامان بالمسم
	Your share % share	%				gives details	oy of the docum for each bond o	r debenture.
	2 Name of margin loan company			1 Name	of con	nnanv		
				Ivanio	01 001	прапу		
	Current portfolio value APIR code (if kno	wn)		T (:				
	\$			Type of ir	nvestm	nent		
	Partner's	0/						
	Your share % share	%		Current a	amoun	t invested	Currency if not	AUD
	If you need more space, provide a separate s	sheet with						
	details.			Your st	nare	%	Partner's	%
			L				share	
				2 Name	of con	npany		
				Type of ir	nvestm	nent		
				Current a	amoun	t invested	Currency if not	AUD
					Г	0/	Partner's	0/
				Your sh	nare	%	share	%
				3 Name	of con	npany		
				Type of ir	nvestn	nent		
				Current a	amoun	t invested	Currency if not	AUD
				Your st	nare	%	Partner's share	%
			Γ	If you ne	ed mo	re space. pr	ovide a separat	e sheet with
				details.				

Loans	and	aifts
LUGIIS	anu	giite

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).

Date lent (DD MM YYYY)

Amount lent

Current balance on loan

Lent by you

Current 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 lo	ane		
Ü	orivate con	ากลก	ies
		•	rm ownership.
No 🕒 Go to	next ques	tion	
es Give	details bel	WC	
1 What you	gave away	or s	old for less than its
market va			
(for examp	oie, money,	car,	second home, land, farm)
Date given or			
(DD MM YYY) What it was y	,		What you got for it
	WOLLII		What you got for it
\$			\$
Your share	Partner's share		Was this gift to a Special
	Share	%	Disability Trust (SDT)?
%		70	No Yes
Date given or			
(DD MM YYY)	,		What you get for it
What it was v	WOLLII		What you got for it
\$			
Ψ			\$
Your share	Partner's share		\$ Was this gift to a Special Disability Trust (SDT)?
·		%	Was this gift to a Special
Your share %	share		Was this gift to a Special Disability Trust (SDT)?
Your share % What you market va	share gave away	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Odd for less than its
Your share % What you market va	share gave away	ors	Was this gift to a Special Disability Trust (SDT)? No Yes
Your share % What you market va	share gave away	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Odd for less than its
Your share % What you market va	share gave away lue ble, money,	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Odd for less than its
Your share % What you market va (for examp	gave away lue ole, money,	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Odd for less than its
Your share % What you market va (for examp Date given or (DD MM YYY)	gave away lue ole, money,	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Old for less than its second home, land, farm)
Your share % What you market va (for examp Date given or (DD MM YYY) What it was v	gave away lue ole, money,	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Old for less than its second home, land, farm) What you got for it
Your share % What you market va (for example) Date given or (DD MM YYY) What it was to	gave away lue ble, money, r sold r/) worth	ors	Was this gift to a Special Disability Trust (SDT)? No Yes Old for less than its second home, land, farm) What you got for it

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 Sive 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.

Name of company

Name of product

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

\$
Your share % Partner's % share %

Your share % share %

Name of company

Name of product

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

\$
Your share % Partner's %

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

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 comp	any
Policy number	Surrender value
	\$
Your share %	Partner's %

2 Name of insurance comp	pany
Policy number	Surrender value
	\$
Your share %	Partner's %

Other income and assets

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 %
2 Type of payment	

2 Type of payment	_
Who pays it?	
Amount per fortnight	
\$	
Date commenced (if known)	
(DD MM YYYY)	
Your share % Partner's share %	6

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

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

No Go to next question

- 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.

Yes Give details below			
1 Description of asset			
	Balance of lo	an(s)	
Current market value	taken to pure	chase	
	J [Partner's	
Currency if not AUD	Your share	share	
	%		%
	J [I L	
2 Description of asset			

Balance of Id	an(s)	
taken to pur	chase	
	Partner's	
Your share	share	
%		%
	Your share	Your share share

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

Continued

Copies of documents with details of payments from outside Australia (If you answered Yes at question 31)	
Real estate details (Mod R) form (If you answered Yes at question 33, 40, 41, and/or 42 or if required at question 44)	
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)	
A Centrelink/DVA schedule or similar schedule or a Details of income stream product (SA330) form (If you answered Yes at question 46)	
Copies of the latest statement for each shareholding listed on a stock/securities exchange (If you answered Yes at question 47)	
Copies of the latest statement for each shareholding not listed on a stock exchange (If you answered Yes at question 48)	
Copies of managed investment certificates or similar documents (If you answered Yes at question 49)	
Copies of the latest statement for margin loans for each investment (If you answered Yes at question 50)	
Copies of investment documents for each bond or debenture (If you answered Yes at question 51)	
Copies of money on loan documents (if available) (If you answered Yes at question 52)	
Copy of the loan agreement or contract (If you answered Yes at question 53)	
Copy of document with details of each bond or investment (If you answered Yes at question 55)	
Copies of funeral service contract (If you answered Yes at question 56)	
Copies of insurance policy documents and latest statements (If you answered Yes at question 57)	
Copy of the most recent statement or certificate that gives details for each type of payment	

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 servicesaustralia.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 servicesaustralia.gov.au/centrelinkuploaddocs
- in person at one of our service centres.