

Income and assets

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.

0R

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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Income and assets (SA369)

centrelink

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

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

No **Go to 10**

Yes Give details below

- 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.

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?			



Yes

CLK0SA369 2412

No ___

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.

9

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

Read this before answering the following question.

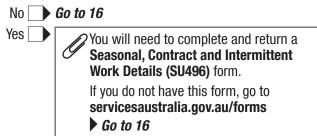
Seasonal work is work that is available for part or parts of the year at approximately the same time each year.

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?



- **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

	stopped working for any employers (including self-employment)?	1 Type of leave entitlement payment	
	No Go to next question		
	Yes 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 Separation Certificate	Date paid or date payable (DD MM YYYY)	
	(SU001) form or letter from the employer), or	Leave entitlement for You Your partner	
	 your (and/or your partner's) business has stopped trading. 	Employer's details Name of business	
	If you do not have this form, go to servicesaustralia.gov.au/forms		
	1 Employer or business name	Australian Business Number (ABN)	
		Phone number (including area code)	
	Australian Business Number (ABN)	There manage (meladang area seas)	
		2 Type of leave entitlement payment	_
	Who works for this employer? You Your partner		
	2 Employer or business name	Amount (before tax Number of working days and other deductions) covered by the payment	
	Australian Business Number (ABN)	\$	
		Date paid or date payable (DD MM YYYY)	
	Who works for this employer? You Your partner	Leave entitlement for You Your partner	$\overline{}$
	If you need more space, provide a separate sheet with details.	Employer's details Name of business	=
14	In the last 12 months, have you (and/or your partner) received or expect to receive, any leave entitlement payments from an employer?	Australian Business Number (ABN)	
	' '	Phone number (including area code)	
	Include: • annual leave	Thore number (metading area code)	
	maternity leave		
	 long service leave or sick leave you received when you stopped work entitlements that you cashed in before you stopped 	If you need more space, provide a separate sheet wit details.	h
	work	45 11 11 11 11 11 11 11 11	
	 money in a long service leave fund or scheme that you have not cashed in. 	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 Provide documents which confirm any	_
	Yes Give details in the next column	redundancy payments (for example,	
	Provide documents which confirm each leave entitlement payment (for	Employment Separation Certificate (SU001) form or letter from the employer).	
	example, Employment Separation 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		

Continued

13 In the last 12 months, have you (and/or your partner)

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 📄

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**

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

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:

Yes

- 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 [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

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.

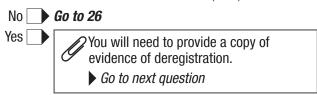
For more information, go to

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**

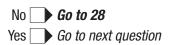
24 Is the private company now deregistered with the Australian Securities and Investments Commission (ASIC)?



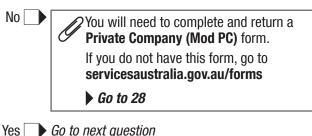
25 Have you (and/or your partner) made any type of gift involving a private company (either registered or deregistered) in the last 5 years?

Include:

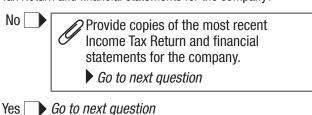
- · forgiving a loan
- transfer of assets to or from a private company for less than their value
- forgoing distributions.



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.

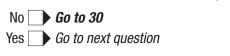
Compensation, insurance and damages include:

- · workers' compensation
- 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

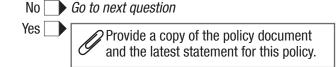
compensation, insurance and/or damages?



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



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.

Type of payment		
Country which pays it?		
Who mays HO		
Who pays it?		
Date commenced (if known)		
Date confinenceu (ii 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				
I waite of person				
Relationship to you				
neiauonsnip to you				
Number of meals				
you provide each day Amount paid per fortnight				
\$				
Date started paying (DD MM YYYY)				
Vour chare 0/ Partner's chare 0/				
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 appear provide a concrete sheet with				
If you need more space, provide a separate sheet with details.				

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

reality 2017 and are remained early our remorniemen		
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	

	sum arrears of a periodic payı e protection payments.	nent such as
• insura	ensation nce	
damafundirScher	g from the National Disability	Insurance
_	Go to next question Give details below	
1 Type	f lump sum	
Who pai	ı it?	
Amount	oaid	
\$		
	d (DD MM YYYY)	
		r partner 🗌
2 Type o	f lump sum	
JI. T		
Who pai	l it?	
Amount	oaid	
\$		

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 %		
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 %		

Continued			
Name of bank, build	ing s	ociety or credit un	ion
Account number (this r	may r	not he vour card n	umber)
Account number (this may not be your card number)			
Current balance Currency			
of account		if not AUD	
Your share	%	Partner's share	%
4 Name of bank, build	ing s	ociety or credit un	ion
Account number (this r	nay r	not be your card n	umber)
Current balance		Currency	
of account		if not AUD	
		Partner's [
Your share	%	share	%
5 Name of bank, build	ing s	ociety or credit un	ion
Account number (this r	nay r	not be your card n	umber)
Current balance		Currency	
of account		if not AUD	
Your share	%	Partner's share	%
6 Name of bank, build	ina sa	0.14.0	ion
Name of bank, build	ing s	boloty of crount un	
Account number (this r	nay r	not be your card n	umber)
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
\$	\$
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

1 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 %

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
Current market value	to purchase
\$	\$
Your share %	Partner's %

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? Model (for example, Coastrunner) Year 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 If you need more space, provide a separate sheet with property. details. If you do not have this form, go to 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 industry

employer

- 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 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			
\$			
Date of joining/investment (DD MM YYYY)			
Owned by: You Your partner			

Continued

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.

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

f)	For each income stream product, you
<i>G</i>	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?

itooiv oodui itioo oxt	mange m	and/or outside	Australia:
Include:			
futures			
options			
 derivatives 			
rights			
 convertible note 	es.		
Do not include:			
managed inves	tmonte		
 investments pu 		with a margin lo	an
- invostinento pu	Toriasoa v	with a margin to	, di i .
No 🌗 Go to next	question		
'es 📄 Give detail	s below		
₽ Prov	vide a cor	y of the latest s	statement
		shareholding in	
I	npany.	onaronoranig ii	
Name of the pul	olic comp	any or ASX cod	е
Number of shares	held	Country if not	Δustralia
itanibor or onaroo	Tiola	Country in Hotz	raotrana
Your share	%	Partner's	%
Tour Share		share	70
Name of the pul	nlic comn	any or ASX code	ρ
Traine or the par		arry or riori ood	
Number of shares	held	Country if not	Australia
		Partner's	
Your share	%	share	%
		Silaic	
Name of the pul	olic comp	any or ASX cod	е
_			
N. I. C. I.	1.11	0 1 1	A I I' .
Number of shares	held	Country if not	Australia
		Partner's	
Your share	%	share	%
		Onaro	
Name of the pul	olic comp	any or ASX cod	е
N. malaguet - I	h a l al	On	A. catura !! -
Number of shares	riela	Country if not	Australia
		Partner's	
Your share	%	share	%

Do not include:				Include: • investment			
managed investmentsinvestments purchased	with a margin I	oan.		personal inlife insurar	vestment plan	ns	
No Go to next question	 nn				ciety bonds.		
es Give details below				Do not includ	_		
	opy of the latest			conventionfuneral bor	al life insuran ıds	ice policies	
or documen shares held	nt that shows th	e number	of	• superannu	ation or rollov	er investments with a margin lo	oan.
Name of public compan	ny			APIR code – i identify indivi		used for fund ma products.	anagers to
Type of shares	Nun	nber of sh	ares	No Go to	•	1	
				Yes Give o	letails below		
Current market value	Your share	Partner's share			gives current	py of the docum t details for eacl , certificate with	n investment
\$	%		%			unt balance).	i iluliibei oi
Name of public compan	ny			1 Name of co	mpany		
Type of shares	Nun	nber of sh	ares	Name of prod	uct and produ	ıct option	
Current market value	Your share %	Partner's share	%	Number of un held (if applica		APIR code (if k	known)
Ψ	70		70				
Name of public compan	ıy			Value of the ir	vestment	Currency if no	t AUD
		1 6 . 1					
Type of shares	Nun	nber of sh	ares	Your share	%	share	%
Commont magnifications loss	Vous abose	Partner's		2 Name of co	mpany		
Current market value \$	Your share %	share	%	Name of prod	ust and produ	unt antion	
Ψ	70		70	Name of prod	uct and produ	ict option	
If you need more space, pr details.	rovide a separat	te sheet v	vith	Number of un		APIR code (if k	known)
					,	,	,
				Value of the ir	vestment	Currency if no	t AUD

0	Do you (and/or your partne investments or securities pu		51		or your partner) side Australia?	own any bonds	or debenture
	No Go to next question Yes Give details below		_	bonds.		and semi-gover	nment
	detailing yo investment.			• funeral be	ociety bonds		
	Name of margin loan co	mpany				or residing in an	aged care
	Current portfolio value	APIR code (if known) Partner's			o next question details below		ant which
	Your share %	share	%	<u></u>		py of the docum for each bond o	
	2 Name of margin loan co	mpany		1 Name of o	company		
	Current portfolio value	APIR code (if known)		Type of inves	stment		
	Your share %	Partner's share	%	Current amo	unt invested	Currency if not	AUD
	If you need more space, pr details.	ovide a separate sheet wit	th	Your share	9 %	Partner's share	%
				2 Name of o	company		
				Type of inves	stment		
				Current amo	unt invested	Currency if not	AUD
				Your share	%	Partner's share	%
				3 Name of o	company		
				Type of inves	stment		
				Current amo	unt invested	Currency if not	AUD
				Your share	%	Partner's share	%
				If you need r	nore space, pro	ovide a separate	sheet with

Loans	and	aifts
LUGIIS	allu	giite

Have you (and/or your partner) lent money to another person or organisation?Include all loans, whether they are made to family

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?

a right to any o	cash, asset	ts, p	roperty or income?
Include: • forgiven lo			
shares in private companiestransfer of business or farm ownership.			
No Go to	•		
		or s	sold for less than its
market val (for examp		car	, second home, land, farm)
Date given or (DD MM YYYY			
What it was v	vorth		What you got for it
\$			\$
Your share	Partner's share		Was this gift to a Special Disability Trust (SDT)?
%		%	No Yes
Date given or (DD MM YYYY			
What it was v	,		What you got for it
\$			\$
Your share	Partner's share		Was this gift to a Special Disability Trust (SDT)?
%		%	No Yes
	, ,	or s	sold for less than its
market val (for examp		car	, second home, land, farm)
Date given or (DD MM YYYY			
What it was v	vorth		What you got for it
\$			\$
Your share	Partner's share		Was this gift to a Special Disability Trust (SDT)?
%		%	No Yes

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 %

Name of company

Name of product

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

S

Your share

W

Partner's %

Partner's %

Partner's %

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 comp	any
Deliny number	Currender value
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 %	artner's %

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

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

9 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.

Ye	s Give details below
1	Description of asset

No Go to next question

Your share	Partner's share	
%		%
		Your share share

2 Description of asset			
Current market value	Balance of lo		
Currency if not AUD	Your share %	Partner's share	%

Checklist

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	pply
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 Yes 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 (If you answered Yes at question 58)	

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.