

# Salary Packaging Application Form



## 1. Your Personal Details:

Organisation Name:

Department:

Job Title:

Payroll No:

Dr	Mr	Mrs	Ms	Miss	First Name:	Surname:
					Date of Birth:	

Postal Address:

Suburb:

State:

Postcode:

### Contact Details

Home:

Work:

Mobile:

Email:

Please tick any item below that applies to you:

Company Car
  Child Support
  HECS/HELPS
  Casual Employee
  Short Term Contract

*Please Note: Casual employees must check with their employer if they are eligible to participate in salary packaging.*

Your Gross Fortnightly Income: \$

### Personal Bank Account Details (Expense Reimbursement Bank Account)

Account Name:	BSB Number:	Account Number:
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## 2. Living Expenses You Wish To Salary Package & Account Payable To:

Expense Item	Bank	BSB Number (or Biller Code for Credit Card)	Account Number or Credit Card Number	Transaction Reference Number	Amount Per Fortnight
<b>Items within Capped Limit</b>					
Mortgage					\$
Rent					\$
Credit Card Purchases					\$
Other Loan Repayments					\$
Salary Packaging Card	(Please complete an ANZ Salary Packaging Card Application Form for this card)				\$
<b>Exempt Items</b>					
Meal Entertainment Card	(Please complete an ANZ Salary Packaging Card Application Form for this card)				\$
Meal Entertainment Fund					\$
Other Exempt Item*					\$
*Please visit our website for a full list of exempt items that can be salary packaged.					<b>TOTAL:</b> \$

I wish to maximise\* my salary packaging for the current FBT year (Please Tick):

\*Maximising is salary packaging the annual capped limit within the number of pay periods remaining until the 31st March next year.

Yes:  No:

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## 3. Attach Documented Evidence:

You must prove that the payments that Salary Options will make are for legitimate expenses for FBT purposes.

Please attach **Documented Evidence** of every expense you have selected to salary package.

The total value of evidence you supply should equal the amount you wish to salary package for each expense annually. If not, you will need to forward evidence as required in order for Salary Options to continue payments to your account/s. This will mainly apply to Credit Card Purchases and Line of Credit Home Loans.

## 4. Additional Notes: *(Please advise us of any further information we need to be aware of below)*

## 5. Your Agreement & Declaration:

The Salary Packaging Policy set down by your Employer offers a number of remuneration options that can be taken as a cash salary and non-cash benefit items. Each staff member is able to select their own salary packaging benefit item/s only from those offered by their employer.

When entering into this agreement, the employee authorises the payroll deductions to enable payment of the salary packaging benefit and administration fee. Recognising, that the amount of deduction will vary from time to time.

- Benefit items must be a legitimate expenditure of the employee.
- Benefit payments can only be made post deduction from a staff members pay. Non payment of the staff member will result in non payment of the benefit.
- Any changes to the package i.e. employment status, extended periods of leave, banking details, personal details and contact details must be made in writing to Salary Options.
- Any incorrect information provided to Salary Options that results in a Fringe Benefits Tax will be the liability of the of the employee.
- If payments are made, whether to the employee or a third-party, in excess of amounts declared as salary packaging, Salary Options on behalf of the employer can take steps to recover these funds.
- Employee withdrawal from salary packaging must be made in writing to Salary Options giving 30 days notice. Reconciliation of funds will be finalised and any held balance will be either paid out or returned to payroll as determined by employee and employer.

### Your Declaration:

I declare the following;

- I have read and understood the information regarding salary packaging as advised on the Salary Options website.
- I have read and agree to the terms and conditions of salary packaging as set down by Salary Options on their web site.
- I acknowledge that all written and verbal information provided by Salary Options is specific only to Salary Packaging. The information provided does not constitute financial or taxation advice. Salary Options recommends that employees seek independent financial advise from a qualified Financial Advisor or Accountant.
- This form is true and correct to the best of my knowledge.

**Signature:**

**Date:**            /            /