

# Employment termination payments questionnaire

**Taxpayer's name**

**Tax file number**

**Year ended**

**Address**

1. Have you received an ETP during the income year? **YES/NO**

If **no**, you do not have to complete the remainder of this questionnaire and no amount gets shown at **Item 4** of the income tax return form.

2. If **yes**, please provide details on when you ceased employment and the circumstances surrounding the cessation of your employment: (e.g., retirement, redundancy etc.). **YES/NO**

**Circumstances**

**Date**

3. Did you receive a payment from an employer on termination of your employment during the income year that included any of the following?

- |  |               |
|--|---------------|
| (a) Unused annual leave                                | <b>YES/NO</b> |
| (b) Unused long service leave                          | <b>YES/NO</b> |
| (c) A payment in lieu of notice                        | <b>YES/NO</b> |
| (d) Unused sick leave                                  | <b>YES/NO</b> |
| (e) Unused RDOs  | <b>YES/NO</b> |
| (f) A "golden handshake"                               | <b>YES/NO</b> |
| (g) A genuine redundancy payment                       | <b>YES/NO</b> |
| (h) A payment in respect of an early retirement scheme | <b>YES/NO</b> |
| (i) A pension or annuity                               | <b>YES/NO</b> |
| (j) An invalidity payment                              | <b>YES/NO</b> |
| (k) CGT exempt amount (under Subdivision 152-D).       | <b>YES/NO</b> |
| (l) Other – please specify:                            | <b>YES/NO</b> |

4. If you have received an employment termination payment, have you received the following documents?

- An employment income statement
- ETP payment summary/s

YES/NO

YES/NO

If you have not received this documentation then you should contact your employer. This is because these documents are necessary before your income tax return can be lodged.

### **Taxpayer's employment termination payments declaration**

- A. I confirm that the above details in relation to employment termination payments are correct;
- B. My tax agent has explained to me the law and income tax lodgment requirements as they relate to employment termination payments; and
- C. I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.

**Signed**

**Dated**