

# 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: **YES/NO**  
 (e.g., retirement, redundancy etc.).

<b>Circumstances</b>	<b>Date</b>
_____	_____
_____	_____
_____	_____

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** .....