

Salary or wages questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Address _____

1. Have you received a payment summary for the income year? **YES/NO**

If **no**, **Item 1** on the income tax return does not need to be completed.

If **yes**, please provide a list of employers from whom you received payment of salary and wages during the income year.

Employer	Employment period	
_____	_____ to _____	
_____	_____ to _____	
_____	_____ to _____	

2. Have you lost any payment summaries that were sent to you by any of the employer(s) mentioned above? **YES/NO**

If **yes**, go to question 3.

If **no**, go to question 4.

3. If you have lost a payment summary, have you obtained a replacement document from your employer that contains the same information as your original payment summary? **YES/NO**

If **yes**, please provide a list of the payment summaries that you have lost and the income and tax withheld in relation to that salary and wage income.

Employer	Tax withheld	Salary
_____	_____	_____
_____	_____	_____

If **no**, you should approach your employer for a letter outlining all of the information that was contained on the original payment summary.

(Note an appropriately authorised tax agent can also check the ATO portal for any pre-filled information that may be of assistance)

4. Did you receive any of the following payments/benefits during the income year?
- Allowances **YES/NO**
 - Lump sum payments in arrears **YES/NO**
 - Reportable fringe benefits **YES/NO**
 - Reportable employer superannuation contributions **YES/NO**
 - Genuine redundancy or early retirement payment **YES/NO**
 - Annual or long service leave on termination **YES/NO**
 - Other (specify) _____ **YES/NO**

If you answered yes to any of the payments/benefits in question 4, please provide details of the payments/benefits if they are not disclosed on your payment summaries:

Description of payment	Amount
_____	_____
_____	_____

Taxpayer's salary and wages declaration

- A. I confirm that I have provided information on all salary and wages that I received during the income year, including receipt of allowances and other assessable payments;
- B. My tax agent has explained to me the law as it relates to salary and wages and when these amounts are assessable. I further advise that I understand the explanation provided by my tax agent and understand that if any amounts of salary and wages are omitted from my tax return then penalties may apply; 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