

Claim form

– expense reimbursement

Please complete all sections of this form to claim a reimbursement for an expense you have already paid. Send your completed form to info@salary.com.au or post to **PO Box 252 Flinders Lane, VIC 8009**.

Section 1: Your details

Package ID		Employer name	
First name		Last name	
Date of birth		Phone	
Email address			

Section 2: Your bank account details

Please transfer funds to the account below

<input type="checkbox"/> Please pay to my default bank account	OR	<input type="checkbox"/> Please pay to the bank details below	
BSB number		Account number	
Account name		Reference	

Section 3: Reimbursement details

Please confirm the total amount claimed per benefit payment

Expense dates (DD/MM/YY)	Expense description	Total claim amount	GST (if applicable)
to		\$	\$
to		\$	\$
to		\$	\$
to		\$	\$
to		\$	\$

See **Section 6 - Supporting Documentation** on page 2 for details of the documents required to support your claim. Where no supporting documentation is provided, payment will not be made.

Section 4: Declarations

I declare that:

- Neither I nor an associate are claiming the amounts on this form through any other salary packaging facility, nor are the amounts being paid or reimbursed by my employer (or associate's employer), and are not being (and will not be) used for any other tax deductible purpose.
- The total amount being claimed on this form is for previously unclaimed purchases only and not for cash advances, purchases where funds have been returned or an outstanding balance of previously claimed transactions.
- I understand I may be subject to an Australian Taxation Office (ATO) audit at any time and may incur a future tax liability on any funds received without legitimate documentation and/or proof of occurrence.

Substantiation and Compliance Declaration and Warranty

- I have attached copies of documentation to substantiate this claim and warrant that the total amount claimed on this form is substantiated by the attached documentation.
- I declare and warrant that I hold (and will continue to hold) original documentation to substantiate any expenses that are or become included in the salary package provided to me by my employer from time to time. I understand that I am required to retain these records for a period of seven years.
- I agree to indemnify my employer from and against any Fringe Benefits Tax liability incurred as a result of the parties entering into this salary packaging arrangement, including, without limitation, where I am not able to produce original documentation to support any expense when requested to do so by you or my employer.

Signature*

Date

Section 5: Checklist

- | | |
|---|---|
| <input type="checkbox"/> I have completed my claim details above. | <input type="checkbox"/> I have signed this form above. |
| <input type="checkbox"/> I have read and agreed to the Section 4: Declarations . | <input type="checkbox"/> I have included all pages of my supporting documentation with this claim form. |

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Section 6: Supporting documentation

Where no supporting documentation is provided, payments will not be made.

Expense type	Documentation required
Mortgage repayment (excluding investment properties)	Current statement showing the BSB, account number, amount owing and 2 consecutive payments.
Personal loan repayment	Current statement showing the BSB, account number, amount owing and 2 consecutive payments.
Rent	Current lease or rental declaration showing your name, address, rent amount, length of lease and proof of 2 consecutive payments.
Education payments (school fees, child care, HELP)	Invoice showing amount owing and proof of up to 12 months' worth of payments.
Health insurance	Policy document showing the amount owing and proof of 2 consecutive payments.
Income Protection insurance	Policy document showing the amount owing and proof of 2 consecutive payments.
Household bills (rates, power, groceries etc.)	Invoice showing payment details, amount owing and proof of payment. If this payment includes GST, the tax invoice must show the GST amount.
Meal and Entertainment benefits (holiday accommodation)	Invoice showing payment details, amount owing and proof of payment. If this payment includes GST, the tax invoice must show the GST amount.
Credit card	<p>Credit card statement showing amount owing and up to 12 monthly statements.</p> <p>Please ensure that you blank out the credit card number from your statement before submitting it to us, as per this example:</p> 