

**centrelink**

Use this form to tell us about your income and assets so we can work out your (and your partner's) payment.

## If you have a partner

You must tell us about your partner's income and assets.  
You can complete this form for both you and your partner.

**OR**

You may choose to complete an **Income and Assets (SA369)** form separately.

If you choose this option, tick this box

If you need more copies of this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

## Online services



### Upload documents

You can complete this form on your computer, print and sign it, and upload it and any supporting documents online.

For more information about how to access an online account or how to lodge documents online, go to [servicesaustralia.gov.au/centrelinkuploaddocs](http://servicesaustralia.gov.au/centrelinkuploaddocs)

## What else you will need to provide

If you are making a claim, you must return this form and **all** other supporting documents at the same time you lodge your claim form. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

## For more information

Go to [servicesaustralia.gov.au/income](http://servicesaustralia.gov.au/income) or [servicesaustralia.gov.au/assets](http://servicesaustralia.gov.au/assets)

If you need to call us, go to [servicesaustralia.gov.au/phoneus](http://servicesaustralia.gov.au/phoneus)

We can translate documents you need for your claim or payment for free.

To speak to us in your language, call **131 202**.

Call charges may apply.

If you have a hearing or speech impairment, you can contact the **TTY service Freecall™ 1800 810 586**. A TTY phone is required to use this service.



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**centrelink**

## Filling in this form

You can complete this form on your computer, print and sign it.

If you have a printed form:

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this  **Go to 1** skip to the question number shown.
- You and your partner can both use this form. However, for privacy, you may choose to complete separate forms.

## About you

**1** Your Customer Reference Number (if known)

-  -  -

**2** Your name

Family name

First given name

Second given name

**3** Your date of birth

/  /

**4** Do you have a partner?

No  **Go to 8**

Yes  **Go to next question**

**5** Your partner's Customer Reference Number (if known)

-  -  -

**6** Your partner's name

Family name

First given name

Second given name

**7** Your partner's date of birth

/  /

## Employment related income

**8** Are you (and/or your partner) currently paid or expecting to be paid any income from work other than self-employment?

**Include gross** income from:

- wages
- salaries
- amounts voluntarily salary sacrificed into superannuation
- the value of employer provided fringe benefits.

**Do not include** self-employment or business income. This will be asked later in the form.

No  **Go to 10**

Yes  Give details below

 Provide a copy of the 2 most recent payslips from each employer.

**1** Person working for this employer

You  Your partner

Employer's name

Address

Postcode

Phone number

Australian Business Number (ABN)

-  -  -

Is this work:

Full-time  Part-time  Seasonal  Casual

Personnel, service or clock-card number

Hours worked per fortnight

per fortnight

**Gross** amount paid per fortnight (before tax and other deductions)

\$  per fortnight

Do you receive the same amount each pay day?

No  Yes



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Continued

**2** Person working for this employer  
You  Your partner

Employer's name

Address

Postcode

Phone number

Australian Business Number (ABN)  
---

Is this work:  
Full-time  Part-time  Seasonal  Casual

Personnel, service or clock-card number

Hours worked per fortnight  per fortnight

Gross amount paid per fortnight (before tax and other deductions) \$  per fortnight

Do you receive the same amount each pay day?  
No  Yes

If you need more space, provide a separate sheet with details.

**9** Read this before answering the following question.

**Fringe benefits** – means a benefit received as part of employment income but not as a wage or salary.

Do you (and/or your partner) get any fringe benefits provided by an employer?

**Include:**

- use of a car as part of a salary package
- rent/mortgage paid
- home phone
- school fees for children
- child care expenses paid
- health insurance premiums.

No  Go to next question

Yes

 Provide a copy of the details that show the type of fringe benefit, its value and if the amount is 'grossed up' or not 'grossed up'.

**10** Are you (and/or your partner) **completing this form to claim** one of the following payments:

- Carer Payment
- Disability Support Pension (including Disability Support Pension Blind if claiming Rent Assistance)
- Farm Household Allowance?

No  Go to 12

Yes  Go to next question

**11** Read this before answering the following question.

**Seasonal work** is work that is available for part or parts of the year at approximately the same time each year.

**Contract work** is any intermittent work that is performed under a contract for a specific function and/or period including sub-contract work.

**Intermittent work** is work that is available from time to time. This includes work that:

- can reasonably be predicted to end or not be available for a period
- is less than one year in duration and does not accrue leave entitlements.

In the last 6 months, have you (and/or your partner) done any seasonal, contract or intermittent work?

No  Go to 16

Yes

 You will need to complete and return a **Seasonal, Contract and Intermittent Work Details (SU496)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

► Go to 16

**12** Are you (and/or your partner) **receiving** one of the following payments:

- Austudy
- Disability Support Pension (including Disability Support Pension Blind claiming Rent Assistance)
- Farm Household Allowance
- JobSeeker Payment
- Parenting Payment
- Youth Allowance?

No  Go to 16

Yes  Go to next question

**13** In the last 12 months, have you (and/or your partner) stopped working for any employers (including self-employment)?

No  Go to next question

Yes  Give details below



Provide documents which confirm:

- that you (and/or your partner) stopped work (for example, **Employment Separation Certificate (SU001)** form or letter from the employer), or
- your (and/or your partner's) business has stopped trading.

If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

**1** Employer or business name

Australian Business Number (ABN)

 -  -  - 

Who works for this employer? You  Your partner

**2** Employer or business name

Australian Business Number (ABN)

 -  -  - 

Who works for this employer? You  Your partner

If you need more space, provide a separate sheet with details.

**14** In the last 12 months, have you (and/or your partner) received or expect to receive, any leave entitlement payments from an employer?

**Include:**

- annual leave
- maternity leave
- long service leave or sick leave you received when you stopped work
- entitlements that you cashed in before you stopped work
- money in a long service leave fund or scheme that you have not cashed in.

No  Go to next question

Yes  Give details in the next column



Provide documents which confirm each leave entitlement payment (for example, **Employment Separation Certificate (SU001)** form or letter from the employer).

If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

*Continued*

**1** Type of leave entitlement payment

Amount (before tax and other deductions)

 \$

Number of working days covered by the payment

Date paid or date payable

 /  / 

Leave entitlement for

You  Your partner

**Employer's details**

Name of business

Australian Business Number (ABN)

 -  -  - 

Phone number

**2** Type of leave entitlement payment

Amount (before tax and other deductions)

 \$

Number of working days covered by the payment

Date paid or date payable

 /  / 

Leave entitlement for

You  Your partner

**Employer's details**

Name of business

Australian Business Number (ABN)

 -  -  - 

Phone number

If you need more space, provide a separate sheet with details.

**15** Have you (and/or your partner) received a redundancy payment in the last 2 years?

No  Go to next question

Yes



Provide documents which confirm any redundancy payments (for example, **Employment Separation Certificate (SU001)** form or letter from the employer).

If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

## Business interests

- 16 Are you (and/or your partner) involved in any type of business?

**Include:**

- farming
- self-employed
- sole trader
- partnership
- sub-contractor.

For more information, go to [servicesaustralia.gov.au/businessypes](http://servicesaustralia.gov.au/businessypes)

No  Go to next question

Yes

 You will need to complete and return a **Business details (Mod F)** form. If the business owns real estate you will also need to complete and return a **Real estate details (Mod R)** form for each property.  
If you do not have these forms, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

- 17 **Read** this before answering the following question.

You (and/or your partner) may be, or have been involved in a trust as:

- a trustee
- an appointor
- a beneficiary

or have:

- made a loan to a private trust
- made a gift of cash, assets, or private property to a private trust in the last 5 years
- relinquished involvement in a private trust in the last 5 years
- a private annuity
- a life interest
- an interest in a deceased estate.

A private trust includes a non-complying Self Managed Superannuation Fund or a non-complying Small Australian Prudential Regulation Authority (APRA) Fund.

For more information, go to [servicesaustralia.gov.au/trustsandcompanies](http://servicesaustralia.gov.au/trustsandcompanies)

Are you or have you (and/or your partner) been involved in a private trust in any of the ways detailed above?

No  Go to 23

Yes  Go to next question

- 18 Is the private trust now vested?

No  Go to 20

Yes

 You will need to provide a copy of evidence of the vesting.  
▶ Go to next question

- 19 Have you (and/or your partner) made any type of gift involving a private trust (either active or vested) in the last 5 years?

**Include:**

- forgiving a loan
- transfer of assets to or from a trust for less than their value
- forgoing distributions.

No  Go to 23

Yes  Go to next question

- 20 Have you completed a **Private Trust (Mod PT)** form or a **Special Disability Trust (Mod SDT)** form in the last 5 years?

No  Go to next question

Yes  Go to 22

- 21 Is the private trust a Special Disability Trust (SDT)?

No

 You will need to complete and return a **Private Trust (Mod PT)** form.  
If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ Go to 23

Yes

 You will need to complete and return a **Special Disability Trust (Mod SDT)** form.  
If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ Go to 23

- 22 Have you provided us with a copy of the most recent Income Tax Return and financial statements for the trust?

No

 Provide copies of the most recent Income Tax Return and financial statements for the trust?  
▶ Go to next question

Yes  Go to next question

**23** Read this before answering the following question.

You (or your partner) may be, or have been in the last 5 years:

- a director of a company
- a shareholder of a company

or have:

- made a loan to a private company
- transferred shares in a private company
- made a gift of cash, assets or property to a private company.

For more information, go to [servicesaustralia.gov.au/trustsandcompanies](http://servicesaustralia.gov.au/trustsandcompanies)

Are you or have you (and/or your partner) been involved with a private company in any of the ways detailed above?

No  **Go to 28**

Yes  **Go to next question**

**24** Is the private company now deregistered with the Australian Securities and Investments Commission (ASIC)?

No  **Go to 26**

Yes   You will need to provide a copy of evidence of deregistration.

▶ **Go to next question**

**25** Have you (and/or your partner) made any type of gift involving a private company (either registered or deregistered) in the last 5 years?

**Include:**

- forgiving a loan
- transfer of assets to or from a private company for less than their value
- forgoing distributions.

No  **Go to 28**

Yes  **Go to next question**

**26** Have you completed a **Private Company (Mod PC)** form in the last 5 years?

No   You will need to complete and return a **Private Company (Mod PC)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ **Go to 28**

Yes  **Go to next question**

**27** Have you provided us with a copy of the most recent Income Tax Return and financial statements for the company?

No   Provide copies of the most recent Income Tax Return and financial statements for the company.

▶ **Go to next question**

Yes  **Go to next question**

## Compensation

**28** Read this before answering the following question.

**Compensation, insurance and damages include:**

- workers' compensation
- motor vehicle
- criminal injuries/victims compensation
- sporting injury
- public liability
- medical negligence
- personal accident and sickness insurance
- income replacement insurance.

Have you (or your partner) ever:

- received
- claimed, or
- been able to claim

compensation, insurance and/or damages?

No  **Go to 30**

Yes  **Go to next question**

**29** Have you (or your partner) told us about this before?

No   You will need to complete and return a **Compensation and damages (Mod C)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

▶ **Go to next question**

Yes  **Go to next question**

**30** Do you (and/or your partner) receive payments from an income protection policy?

No  **Go to next question**

Yes   Provide a copy of the policy document and the latest statement for this policy.

## Other money received

**31** Do you (and/or your partner) receive payments from **outside Australia?**

**Include:**

- pensions from other countries
- benefits
- allowances
- superannuation
- compensation
- war related payments.

You must include details of pensions, allowances and other payments even if:

- they are not taxable in the country of payment, and/or
- you have arranged for your payment to be made to a third party.

No  Go to next question

Yes  Give details below



Provide a copy of the document (for example, latest pension certificate – not a bank statement) from the issuing authority or agency which gives details including the amount in the foreign currency for each payment.

**1** Type of payment

Country which pays it?

Who pays it?

Date commenced (if known) Paid to:

 /  / 

You  Your partner

**2** Type of payment

Country which pays it?

Who pays it?

Date commenced (if known) Paid to:

 /  / 

You  Your partner

If you need more space, provide a separate sheet with details.

**32** Do you (and/or your partner) receive money from any boarders or lodgers living with you?

**Include** boarders or lodgers who live with you or in accommodation at the property you live in (for example, renting out a room, granny flat).

**Do not include** immediate family members (for example, son, daughter, parent or guardian).

No  Go to next question

Yes  Give details below

**1** Name of person

Relationship to you  Number of meals you provide each day

Amount paid per fortnight  Date started paying

\$  / /

Your share  % Partner's share  %

**2** Name of person

Relationship to you  Number of meals you provide each day

Amount paid per fortnight  Date started paying

\$  / /

Your share  % Partner's share  %

If you need more space, provide a separate sheet with details.

**33** Did you enter care accommodation on or after 1 January 2017 and are renting out your former home?

No  Go to next question

Yes



You will need to complete and return a **Real estate details (Mod R)** form.

If you do not have this form, go to **servicesaustralia.gov.au/forms**

Go to next question

**34** In the last 12 months, have you (or your partner) received a lump sum payment that you have not already told us about on this form?

**Do not include:**

- compensation
- insurance
- damages
- funding from the National Disability Insurance Scheme.

No  Go to next question

Yes  Give details below

**1** Type of lump sum

Who paid it?

Amount paid

Date paid

\$

/  /

Who received this lump sum payment?

You  Your partner

**2** Type of lump sum

Who paid it?

Amount paid

Date paid

\$

/  /

Who received this lump sum payment?

You  Your partner

If you need more space, provide a separate sheet with details.

**Bank accounts**

**35** Give details of all accounts held by you (and/or your partner) in banks, building societies or credit unions.

**Include:**

- savings accounts
- cheque accounts
- term deposits
- joint accounts
- accounts you hold in trust or under any other name
- money held in church or charitable development funds.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

**Do not include:**

- shares
- managed investments
- an account used exclusively for funding from the National Disability Insurance Scheme.

 Provide evidence from your financial institution that shows your current account balance, account number and account holder name(s) for each account held. Copies can be provided. ATM slips are not acceptable.

**1** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

**2** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

Continued

**3** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

**4** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

**5** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

**6** Name of bank, building society or credit union

Account number (this may not be your card number)

Current balance of account

Currency if not AUD

Your share  % Partner's share  %

If you need more space, provide a separate sheet with details.

**Assets**

**36** What is your estimate of the current market value of your (and/or your partner's) household contents and personal effects?

The **current market value** is the price that you would expect to get if you sold the item. It is not the replacement or insured value.

**Include:**

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use and hobby collections (for example, stamps, coins).

**Do not include:**

- fixtures such as stoves and built-in items.

Current market value	Balance of loan(s) taken to purchase
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**37** Do you (and/or your partner) own, partly own or have a financial interest in any motor vehicles, motor cycles or trailers?

No  Go to next question

Yes  Give details below

**1** Type of asset (for example, car)

Make (for example, Ford)

Model (for example, Focus)

Year

Current market value	Balance of loan(s) taken to purchase
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**2** Type of asset (for example, car)

Make (for example, Ford)

Model (for example, Focus)

Year

Current market value	Balance of loan(s) taken to purchase
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

**38** Do you (and/or your partner) own, partly own or have a financial interest in any boats or caravans/motor homes?

**Do not include** a boat or caravan that you live in.

No  Go to next question

Yes  Give details below

<b>1</b> Type of asset (for example, boat)	Make (for example, Quintrex)
<input type="text"/>	<input type="text"/>
Model (for example, Coastrunner)	Year
<input type="text"/>	<input type="text"/>
Current market value	Balance of loan(s) taken to purchase
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b> Type of asset (for example, caravan)	Make (for example, Jayco)
<input type="text"/>	<input type="text"/>
Model (for example, Heritage)	Year
<input type="text"/>	<input type="text"/>
Current market value	Balance of loan(s) taken to purchase
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

**39** Do you (and/or your partner) own, or are buying, or have a life interest in your home?

**A life interest** means you have the right to reside in your home for life.

No  Go to 43

Yes  Go to next question

**40** Is the home on a block of land larger than 2 hectares (5 acres)?

No  Go to next question

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ Go to 42

**41** Does the property that you (and/or your partner) live on have more than one title document?

No  Go to next question

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**42** Is any part of the home property used for income producing purposes?

**Do not include** rent from boarders or lodgers.

No  Go to next question

Yes  You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**43** Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia?

No  Go to 45

Yes  Go to next question

**44** How many other properties in and/or outside Australia do you (and/or your partner) own or have a interest in?

You will need to complete and return a **Real estate details (Mod R)** form for each property. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

## Superannuation

45 Read this before answering the following question.

Answer this question **only** if you (and/or your partner) are Age Pension age or claiming Age Pension otherwise, **Go to 46**

To work out if you (or your partner) are Age Pension age, use the table below.

Date of birth	Qualifying age at
1 January 1954 to 30 June 1955	66 years
1 July 1955 to 31 December 1956	66 years and 6 months
From 1 January 1957	67 years

Do you (and/or your partner) have any money invested in superannuation in Australia where the fund is not paying a pension?

### Include:

- superannuation funds such as:
  - retail
  - industry
  - corporate
  - employer
  - public sector
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

**SPIN code** – is commonly used for fund managers to identify superannuation products.

No  Go to next question

Yes  Give details below

 Provide a copy of the latest statements for superannuation funds and retirement savings accounts. If you have a SMSF or SAF, provide the financial statement including income tax return and member statement.

1 Name of institution/fund manager or SPIN code

Name of fund

Product reference number      Date of joining/investment

       /  / 

Current market value      Owned by

 \$      You  Your partner 

Continued

2 Name of institution/fund manager or SPIN code

Name of fund

Product reference number      Date of joining/investment

       /  / 

Current market value      Owned by

 \$      You  Your partner 

If you need more space, provide a separate sheet with details.

46 Read this before answering the following question.

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a retirement savings account
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF).

### Types of income streams include:

- account-based pension (also known as allocated pension)
- market-linked pension (also known as term allocated pension)
- lifetime income stream
- pooled lifetime income stream
- life expectancy income stream
- term income stream
- defined benefit pension (for example, public sector and private sector defined benefit pensions).

Do you (and/or your partner) receive income from any Australian income stream products?

No  Go to next question

Yes  Give details in the next column

-  For each income stream product, you (and/or your partner) will need to provide:
- a Centrelink/DVA schedule or similar schedule, or
  - a **Details of income stream product (SA330)** form.

The schedule or form must be completed by:

- your product provider
- the trustee of the SMSF or SAF, or
- the SMSF administrator.

If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

Continued

**1** Name of product provider/SMSF/SAF

Type of income stream

Product reference number    Commencement date  
                      /    /

Owned by: You     Your partner

**2** Name of product provider/SMSF/SAF

Type of income stream

Product reference number    Commencement date  
                      /    /

Owned by: You     Your partner

If you need more space, provide a separate sheet with details.

**Financial assets**

**47** Do you (and/or your partner) own any shares, options, rights, convertible notes or other securities **listed** on a stock/securities exchange in and/or outside Australia?

**Include:**

- futures
- options
- derivatives
- rights
- convertible notes.

**Do not include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

 Provide a copy of the latest statement detailing the shareholding in each company.

**1** Name of the public company or ASX code

Number of shares held	Country if not Australia
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**2** Name of the public company or ASX code

Number of shares held	Country if not Australia
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**3** Name of the public company or ASX code

Number of shares held	Country if not Australia
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**4** Name of the public company or ASX code

Number of shares held	Country if not Australia
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

**48** Do you (and/or your partner) own any shares, options or rights in public companies, **not listed** on a stock exchange?

**Do not include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

 Provide a copy of the latest statement or document that shows the number of shares held.

**1** Name of public company

Type of shares	Number of shares
<input type="text"/>	<input type="text"/>

Current market value	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

**2** Name of public company

Type of shares	Number of shares
<input type="text"/>	<input type="text"/>

Current market value	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

**3** Name of public company

Type of shares	Number of shares
<input type="text"/>	<input type="text"/>

Current market value	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you need more space, provide a separate sheet with details.

**49** Do you (and/or your partner) own any managed investments in and/or outside Australia?

**Include:**

- investment trusts
- personal investment plans
- life insurance bonds
- friendly society bonds.

**Do not include:**

- conventional life insurance policies
- funeral bonds
- superannuation or rollover investments
- investments purchased with a margin loan.

**APIR code** – is commonly used for fund managers to identify individual financial products.

No  Go to next question

Yes  Give details below

 Provide a copy of the document which gives current details for each investment (for example, certificate with number of units or account balance).

**1** Name of company

Name of product and product option

Number of units held (if applicable)	APIR code (if known)
<input type="text"/>	<input type="text"/>

Value of the investment	Currency if not AUD
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**2** Name of company

Name of product and product option

Number of units held (if applicable)	APIR code (if known)
<input type="text"/>	<input type="text"/>

Value of the investment	Currency if not AUD
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

**50** Do you (and/or your partner) own any managed investments or securities purchased with a margin loan?

No  Go to next question

Yes  Give details below

 Provide a copy of the latest statement detailing your margin loan(s) for each investment.

**1** Name of margin loan company

Current portfolio value

APIR code (if known)

\$

Your share  %

Partner's share  %

**2** Name of margin loan company

Current portfolio value

APIR code (if known)

\$

Your share  %

Partner's share  %

If you need more space, provide a separate sheet with details.

**51** Do you (and/or your partner) own any bonds or debentures in and/or outside Australia?

Bonds refer to government and semi-government bonds.

**Do not include:**

- friendly society bonds
- funeral bonds
- life insurance bonds
- accommodation bonds for residing in an aged care facility.

No  Go to next question

Yes  Give details below

 Provide a copy of the document which gives details for each bond or debenture.

**1** Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share  %

Partner's share  %

**2** Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share  %

Partner's share  %

**3** Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share  %

Partner's share  %

If you need more space, provide a separate sheet with details.

## Loans and gifts

- 52 Have you (and/or your partner) lent money to another person or organisation?

**Include** all loans, whether they are made to family members, other people or organisations or trusts.

**Do not include** loans to secure accommodation in retirement villages or aged care.

No  Go to next question

Yes  Give details below

 Provide a copy of the document which gives details for each loan (if available).

**1** Who did you lend the money to?

<input type="text"/>		
Date lent	Amount lent	
<input type="text" value="/ /"/>	<input type="text" value="\$"/>	
Current balance on loan	Lent by you	Lent by your partner
<input type="text" value="\$"/>	<input type="text" value="%"/>	<input type="text" value="%"/>

**2** Who did you lend the money to?

<input type="text"/>		
Date lent	Amount lent	
<input type="text" value="/ /"/>	<input type="text" value="\$"/>	
Current balance on loan	Lent by you	Lent by your partner
<input type="text" value="\$"/>	<input type="text" value="%"/>	<input type="text" value="%"/>

If you need more space, provide a separate sheet with details.

- 53 In the last 12 months, have you (and/or your partner) taken out a Reverse Mortgage or Home Equity Conversion Loan against your home?

No  Go to next question

Yes  Give details below

 Provide a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

If you need more space, provide a separate sheet with details.

- 54 In the last 5 years, have you (and/or your partner) given away, sold for less than their market value or surrendered a right to any cash, assets, property or income?

**Include:**

- forgiven loans
- shares in private companies
- transfer of business or farm ownership.

No  Go to next question

Yes  Give details below

**1** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

<input type="text"/>		
Date given or sold	What it was worth	
<input type="text" value="/ /"/>	<input type="text" value="\$"/>	
What you got for it	Your share	Partner's share
<input type="text" value="\$"/>	<input type="text" value="%"/>	<input type="text" value="%"/>
Was this gift to a Special Disability Trust (SDT)?		
No <input type="checkbox"/> Yes <input type="checkbox"/>		

**2** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

<input type="text"/>		
Date given or sold	What it was worth	
<input type="text" value="/ /"/>	<input type="text" value="\$"/>	
What you got for it	Your share	Partner's share
<input type="text" value="\$"/>	<input type="text" value="%"/>	<input type="text" value="%"/>
Was this gift to a Special Disability Trust (SDT)?		
No <input type="checkbox"/> Yes <input type="checkbox"/>		

**3** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

<input type="text"/>		
Date given or sold	What it was worth	
<input type="text" value="/ /"/>	<input type="text" value="\$"/>	
What you got for it	Your share	Partner's share
<input type="text" value="\$"/>	<input type="text" value="%"/>	<input type="text" value="%"/>
Was this gift to a Special Disability Trust (SDT)?		
No <input type="checkbox"/> Yes <input type="checkbox"/>		

If you need more space, provide a separate sheet with details.

## Funeral arrangements and life insurance

**55** Do you (and/or your partner) have any funeral bonds/ funeral investments, including a pre-paid funeral?

No  **Go to 57**

Yes  Give details below

 Provide a copy of the document which gives details for each bond or investment.

**1** Name of company

Name of product

Purchase price including instalments but not interest      Current value as per latest statement

\$ <input type="text"/>	\$ <input type="text"/>
-------------------------	-------------------------

Your share <input type="text"/> %	Partner's share <input type="text"/> %
-----------------------------------	--

**2** Name of company

Name of product

Purchase price including instalments but not interest      Current value as per latest statement

\$ <input type="text"/>	\$ <input type="text"/>
-------------------------	-------------------------

Your share <input type="text"/> %	Partner's share <input type="text"/> %
-----------------------------------	--

If you need more space, provide a separate sheet with details.

**56** Do you (and/or your partner) have a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No  **Go to next question**

Yes   Provide a copy of each contract.

**57** Do you (and/or your partner) have a life insurance policy that can be cashed in?

**Include:**

- policies with a surrender value (for example, whole of life, paid up and endowment policies).

**Do not include:**

- friendly society bonds
- life insurance bonds
- details of home, contents, car, mortgage or similar policies.

No  **Go to next question**

Yes  Give details below

 Provide a copy of the policy document and the latest statement for each policy.

**1** Name of insurance company

Policy number	Surrender value
<input type="text"/>	\$ <input type="text"/>

Your share <input type="text"/> %	Partner's share <input type="text"/> %
-----------------------------------	--

**2** Name of insurance company

Policy number	Surrender value
<input type="text"/>	\$ <input type="text"/>

Your share <input type="text"/> %	Partner's share <input type="text"/> %
-----------------------------------	--

If you need more space, provide a separate sheet with details.

## Other income and assets

**58** Do you (and/or your partner) receive any payments that you have not already told us about on this form?

**Include:**

- Department of Veterans' Affairs (DVA) payments
- New Enterprise Incentive Scheme (NEIS) Allowance
- gratuities
- match or sporting payments
- non-monetary payments for services
- scholarships, educational assistance or allowance
- any other income.

**Do not include:**

- funding from the National Disability Insurance Scheme (NDIS)
- Parental Leave Pay
- Dad and Partner Pay.

No  Go to next question

Yes  Give details below

 Provide a copy of the most recent statement/certificate that gives details for each type of payment.

**1** Type of payment

[ ]	
Who pays it? [ ]	
Amount per fortnight	Date commenced (if known)
\$ [ ]	[ ] / [ ] / [ ]
Your share [ ] %	Partner's share [ ] %

**2** Type of payment

[ ]	
Who pays it? [ ]	
Amount per fortnight	Date commenced (if known)
\$ [ ]	[ ] / [ ] / [ ]
Your share [ ] %	Partner's share [ ] %

**3** Type of payment

[ ]	
Who pays it? [ ]	
Amount per fortnight	Date commenced (if known)
\$ [ ]	[ ] / [ ] / [ ]
Your share [ ] %	Partner's share [ ] %

If you need more space, provide a separate sheet with details.

**59** Do you (and/or your partner) own any other assets (in or outside Australia) that you have not already told us about on this form?

**Include:**

- taxi plates
- time share
- racehorses
- greyhounds
- travellers cheques
- crypto currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting)
- water assets including rights, allocations or licences not associated with land owned by you (and/or your partner).

**Do not include** an account used exclusively for funding from the NDIS.

No  Go to next question

Yes  Give details below

**1** Description of asset

[ ]		
Current market value	Balance of loan(s) taken to purchase	
[ ]	[ ]	
Currency if not AUD	Your share	Partner's share
[ ]	[ ] %	[ ] %

**2** Description of asset

[ ]		
Current market value	Balance of loan(s) taken to purchase	
[ ]	[ ]	
Currency if not AUD	Your share	Partner's share
[ ]	[ ] %	[ ] %

If you need more space, provide a separate sheet with details.

## Checklist

- 60** Which of the following forms and/or documents are you (and/or your partner) providing with this form?

You must provide **copies** of documents. The copies will not be returned.

If you are not sure, check the question to see if you should provide the documents.

<b>Tick all that apply</b>	
Copies of the 2 most recent payslips from each employer (If you answered Yes at <b>question 8</b> )	<input type="checkbox"/>
Copies of documents with details of the fringe benefits (If you answered Yes at <b>question 9</b> )	<input type="checkbox"/>
<b>Seasonal, Contract and Intermittent Work Details (SU496)</b> form (If you answered Yes at <b>question 11</b> )	<input type="checkbox"/>
<b>Employment Separation Certificate (SU001)</b> form, letter from the employer or documents confirming your business has stopped trading (If you answered Yes at <b>question 13</b> )	<input type="checkbox"/>
<b>Employment Separation Certificate (SU001)</b> form or letter from the employer (If you answered Yes at <b>question 14 or 15</b> )	<input type="checkbox"/>
<b>Business details (Mod F)</b> form and <b>Real estate details (Mod R)</b> form for each property (If you answered Yes at <b>question 16</b> )	<input type="checkbox"/>
Copy of evidence of the vesting (If you answered Yes at <b>question 18</b> )	<input type="checkbox"/>
<b>Private Trust (Mod PT)</b> form (If you answered No at <b>question 21</b> )	<input type="checkbox"/>
<b>Special Disability Trust (Mod SDT)</b> form (If you answered Yes at <b>question 21</b> )	<input type="checkbox"/>
Copies of the most recent Income Tax Return and financial statements for the trust (If you answered No at <b>question 22</b> )	<input type="checkbox"/>
Copy of evidence of deregistration (If you answered Yes at <b>question 24</b> )	<input type="checkbox"/>
<b>Private Company (Mod PC)</b> form (If you answered No at <b>question 26</b> )	<input type="checkbox"/>
Copies of the most recent Income Tax Return and financial statements for the company (If you answered No at <b>question 27</b> )	<input type="checkbox"/>
<b>Compensation and damages (Mod C)</b> form (If you answered No at <b>question 29</b> )	<input type="checkbox"/>
Copy of income protection policy document and the latest statement (If you answered Yes at <b>question 30</b> )	<input type="checkbox"/>

## Continued

Copies of documents with details of payments from outside Australia (If you answered Yes at <b>question 31</b> )	<input type="checkbox"/>
<b>Real estate details (Mod R)</b> form (If you answered Yes at <b>question 33, 40, 41, and/or 42</b> or if required at <b>question 44</b> )	<input type="checkbox"/>
Copies of documents with details of bank, building society or credit union account balances (Required at <b>question 35</b> )	<input type="checkbox"/>
Copies of the latest statements for superannuation funds and retirement savings accounts or, financial statement including income tax return and member statement for SMSFs and SAFs (If you answered Yes at <b>question 45</b> )	<input type="checkbox"/>
A Centrelink/DVA schedule or similar schedule or a <b>Details of income stream product (SA330)</b> form (If you answered Yes at <b>question 46</b> )	<input type="checkbox"/>
Copies of the latest statement for each shareholding <b>listed</b> on a stock/securities exchange (If you answered Yes at <b>question 47</b> )	<input type="checkbox"/>
Copies of the latest statement for each shareholding <b>not listed</b> on a stock exchange (If you answered Yes at <b>question 48</b> )	<input type="checkbox"/>
Copies of managed investment certificates or similar documents (If you answered Yes at <b>question 49</b> )	<input type="checkbox"/>
Copies of the latest statement for margin loans for each investment (If you answered Yes at <b>question 50</b> )	<input type="checkbox"/>
Copies of investment documents for each bond or debenture (If you answered Yes at <b>question 51</b> )	<input type="checkbox"/>
Copies of money on loan documents (if available) (If you answered Yes at <b>question 52</b> )	<input type="checkbox"/>
Copy of the loan agreement or contract (If you answered Yes at <b>question 53</b> )	<input type="checkbox"/>
Copy of document with details of each bond or investment (If you answered Yes at <b>question 55</b> )	<input type="checkbox"/>
Copies of funeral service contract (If you answered Yes at <b>question 56</b> )	<input type="checkbox"/>
Copies of insurance policy documents and latest statements (If you answered Yes at <b>question 57</b> )	<input type="checkbox"/>
Copy of the most recent statement/certificate that gives details for each type of payment (If you answered Yes at <b>question 58</b> )	<input type="checkbox"/>

## Privacy notice

### 61 You need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We need to collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicessaustralia.gov.au/privacy](https://servicessaustralia.gov.au/privacy)

## Declaration

### 62 I declare that:

- the information I have provided in this form is complete and correct.

#### I understand that:

- if submitting this document as part of a claim, the claim may not be accepted unless supporting documents are lodged at the same time as the claim. The only exception will be if I am waiting for medical evidence or other documents from a third party.
- Centrelink can make relevant enquiries to make sure I receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature



Date

/ /

Partner's signature



Date

/ /

## Returning this form

Return this form and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicessaustralia.gov.au/centrelinkuploaddocs](https://servicessaustralia.gov.au/centrelinkuploaddocs)
- in person at one of our service centres, if you are unable to use your Centrelink online account.