



**centrelink**

## Purpose of this form

This form asks you to provide information about your income and assets.  
This information is used to calculate your income support 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** form (SA369) separately.

If you choose this option, tick this box ☐

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

## Online Services

You can access your Centrelink online account through myGov. myGov is a simple and secure way to access a range of government services online with one username and password. You can create a myGov account at [my.gov.au](https://my.gov.au) and link it to your Centrelink online account. To make a claim online, access your Centrelink online account through myGov, then select 'Online Claims' from the menu.

## Filling in this form

- **Please use black or blue pen.**
- Print in BLOCK LETTERS.
- Mark boxes like this ☐ with a ✓ or ✗.
- Where you see a box like this ☐ ► **Go to 5** skip to the question number shown.  
You do not need to answer the questions in between.

## Returning your form

Check that you have answered all the questions you need to answer, and that you (and your partner if they are claiming a payment) have signed and dated this form.

**Important Note:** If you are making a claim, you must return this form and **all** 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.

You can return this form and any supporting documents:

- online – submit your documents online (excluding identity documents). For more information about how to access an Online Account or how to lodge documents online, go to [humanservices.gov.au/submitdocumentsonline](https://humanservices.gov.au/submitdocumentsonline)
- by post
- in person – if you are unable to submit this form and any supporting documents online or by post, you can provide them in person to one of our service centres.

## For more information

Go to [humanservices.gov.au/dsp](https://humanservices.gov.au/dsp) or [humanservices.gov.au/carerpayers](https://humanservices.gov.au/carerpayers) or [humanservices.gov.au/agepension](https://humanservices.gov.au/agepension) or call us on **132 717** for Disability, Sickness and Carers or **132 300** for Seniors or visit one of our service centres.

If you need a **translation** of any documents for our business, we can arrange this for you free of charge.

To speak to us in languages other than English, call **131 202**.

**Note:** Call charges may apply.

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

**1** Your name  
Mr ☒ Mrs ☐ Miss ☐ Ms ☐ Other   
Family name  
BRYAN  
First given name  
BOTTERLL  
Second given name

**2** Your date of birth  
23 / 12 / 1988


**3** Your Centrelink Reference Number (if known)  
3 0 3 - 4 2 0 - 2 4 4 - \$

**4** Do you have a partner?  
No ☒ **Go to 8**  
Yes ☐ **Go to next question**

**5** Your partner's name  
Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other   
Family name  
  
First given name  
  
Second given name

**6** Your partner's date of birth  
/ /

**7** Your partner's Centrelink Reference Number (if known)  
- - -

**8** Do you (and/or your partner) CURRENTLY receive any income from work other than self-employment?  
GROSS income from employment **includes** amounts voluntarily salary sacrificed into superannuation and the value of employer provided fringe benefits.  
No ☒ **Go to 10**  
Yes ☐ Give details in the next column  
 Attach a copy of the 2 most recent payslips from each employer.

Continued

**1** Employer's name  
  
Address  
  
  
Postcode  
  
Phone number  
( )  
Australian Business Number (ABN)  
- - -  
Who works for this employer: You ☐ Your partner ☐  
Is this work:  
Full-time ☐ Part-time ☐ Seasonal ☐ Casual ☐  
Personnel, service or clock-card number   
Hours worked per fortnight  per fortnight  
GROSS amount earned per fortnight (before tax and other deductions) \$  per fortnight  
Is this your usual wage? No ☐ Yes ☐

**2** Employer's name  
  
Address  
  
  
Postcode  
  
Phone number  
( )  
Australian Business Number (ABN)  
- - -  
Who works for this employer: You ☐ Your partner ☐  
Is this work:  
Full-time ☐ Part-time ☐ Seasonal ☐ Casual ☐  
Personnel, service or clock-card number   
Hours worked per fortnight  per fortnight  
GROSS amount earned per fortnight (before tax and other deductions) \$  per fortnight  
Is this your usual wage? No ☐ Yes ☐

If you (and/or your partner) currently get income from more than 2 jobs, attach a separate sheet with details.




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- 9 Do you (and/or your partner) get any fringe benefits provided by an employer (e.g. use of a car as part of a salary package, rent/mortgage paid)?

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

No ☐ Go to next question

Yes ☐

 Attach a copy of details that indicate the type of fringe benefit and its value, and whether or not the amount provided is 'grossed up' or not 'grossed up'.

- 10 Are you (and/or your partner) claiming Age Pension?

No ☒ Go to next question

Yes ☐ Go to 12

- 11 Please 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, can reasonably be predicted to end or not be available for a period, is less than a 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 next question

Yes ☒

 You will need to complete and attach a **Seasonal, Contract and Intermittent Work Details** form (SU496). If you do not have this form, go to [humanservices.gov.au/forms](http://humanservices.gov.au/forms)

- 12 Please read this before answering the following question.

The **current market value** of an item is what you would get if you sold it. 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 (e.g. stamps, coins).

**Do NOT include:**

- fixtures such as stoves and built-in items.

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

Current market value	Amount owed
\$ 1500	\$ 800
Your share 100 %	Partner's share %

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

**Include:**

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

**Do NOT include:**

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

No ☒ Go to next question

Yes ☐ Give details below

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

1 Name of insurance company	
Policy number	Surrender value
	\$
Your share %	Partner's share %

2 Name of insurance company	
Policy number	Surrender value
	\$
Your share %	Partner's share %

If you (and/or your partner) have more than 2 insurance policies, attach a separate sheet with details.

**14** 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

<b>1</b> Type of asset (e.g. car)		Make (e.g. Ford)	
CAR		HONDA	
Model (e.g. Focus)		Year	
CIVIC		1995	
Current market value		Amount owed	
\$ 500		\$	
Your share	100 %	Partner's share	%

<b>2</b> Type of asset (e.g. car)		Make (e.g. Holden)	
Model (e.g. Astra)		Year	
Current market value		Amount owed	
\$		\$	
Your share	%	Partner's share	%

If you (and/or your partner) have more than 2 motor vehicles, motor cycles or trailers, attach a separate sheet with details.

**15** 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 is your principal home.

No ☒ Go to next question

Yes ☐ Give details below

<b>1</b> Type of asset (e.g. boat)		Make (e.g. Quintrex)	
Model (e.g. Coastrunner)		Year	
Current market value		Amount owed	
\$		\$	
Your share	%	Partner's share	%

<b>2</b> Type of asset (e.g. caravan)		Make (e.g. Jayco)	
Model (e.g. Heritage)		Year	
Current market value		Amount owed	
\$		\$	
Your share	%	Partner's share	%

If you (and/or your partner) have more than 2 boats, caravans or motor homes, attach a separate sheet with details.

**16** Give details below 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, or 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 or an account used exclusively for funding from the National Disability Insurance Scheme.

 Attach proof of all account balances (e.g. ATM slip, statements, passbooks). Copies can be provided.

<b>1</b>	Name of bank, building society or credit union	CBA		
	Account number (this may not be your card number)	10220667		
	Type of account	SMART ACCESS		
	Balance of account	\$ 31.00		
	Currency if not AUD			
	Your share	100 %	Partner's share	%

<b>2</b>	Name of bank, building society or credit union			
	Account number (this may not be your card number)			
	Type of account			
	Balance of account	\$		
	Currency if not AUD			
	Your share	%	Partner's share	%

<b>3</b>	Name of bank, building society or credit union			
	Account number (this may not be your card number)			
	Type of account			
	Balance of account	\$		
	Currency if not AUD			
	Your share	%	Partner's share	%

*Continued*

<b>4</b>	Name of bank, building society or credit union			
	Account number (this may not be your card number)			
	Type of account			
	Balance of account	\$		
	Currency if not AUD			
	Your share	%	Partner's share	%

<b>5</b>	Name of bank, building society or credit union			
	Account number (this may not be your card number)			
	Type of account			
	Balance of account	\$		
	Currency if not AUD			
	Your share	%	Partner's share	%

If you (and/or your partner) have more than 5 accounts, attach a separate sheet with details.

**17** Do you (and/or your partner) have any bonds or debentures?

Bonds refer to government and semi-government bonds.

**Include:**

- investments in and/or outside Australia


Bonds or debentures 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:**

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

No ☒ Go to next question

Yes ☐ Give details below

 Attach 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 (and/or your partner) have more than 3 bonds or debentures, attach a separate sheet with details.


**18** Do you (and/or your partner) have money on loan 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 get accommodation in a hostel.

No ☒ Go to next question

Yes ☐ Give details below

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

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

Date lent

 /  / 

Amount lent

 \$

Current balance of loan

 \$

Lent by you

 %

Lent by your partner

 %

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

Date lent

 /  / 

Amount lent

 \$

Current balance of loan

 \$

Lent by you

 %

Lent by your partner

 %

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

Date lent

 /  / 

Amount lent

 \$

Current balance of loan

 \$

Lent by you

 %

Lent by your partner

 %

If you (and/or your partner) have more than 3 loans, attach a separate sheet with details.


- 19 Do you (and/or your partner) own any shares, options, rights, convertible notes or other securities **LISTED** on an Australian Stock Exchange (e.g. ASX, NSX, APX or Chi-X) or a stock exchange outside Australia?

**Include** shares traded in exempt stock markets.

**Do NOT include** managed investments.

No ☒ Go to next question

Yes ☐ Give details below

 Attach a copy of the latest statement for each share holding.

**1** Name of company

Number of shares  
or other securities

ASX code (if known)

Country if not Australia

Your share

Partner's  
share

%

%

Margin loan balance

\$

**2** Name of company

Number of shares  
or other securities

ASX code (if known)

Country if not Australia

Your share

Partner's  
share

%

%

Margin loan balance

\$

**3** Name of company

Number of shares  
or other securities

ASX code (if known)

Country if not Australia

Your share

Partner's  
share

%

%

Margin loan balance

\$


If you (and/or your partner) have more than 3 share holdings, attach a separate sheet with details.

- 20 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.

No ☒ Go to next question

Yes ☐ Give details below

 Attach a copy of the latest statement detailing your share holding for each company (if available).

**1** Name of company

Type of shares

Number of shares

Current market value

Your share

Partner's  
share

\$

%

%

**2** Name of company

Type of shares

Number of shares

Current market value

Your share

Partner's  
share

\$

%

%

**3** Name of company

Type of shares

Number of shares

Current market value

Your share

Partner's  
share

\$

%

%

**4** Name of company

Type of shares

Number of shares

Current market value

Your share

Partner's  
share

\$

%

%

If you (and/or your partner) have more than 4 share holdings, attach a separate sheet with details.

**21** Do you (and/or your partner) have 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.

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

No ☒ **Go to next question**

Yes ☐ **Give details below**

 Attach a copy of a document which gives details (e.g. certificate with number of units or account balance) for each investment.

**1** Name of company

Name of product (e.g. investment trust)      Type of product/option (e.g. balanced, growth)

Number of units      APIR code (if known)

Current market value      Currency if not AUD

Your share  %      Partner's share  %

**2** Name of company

Name of product (e.g. investment trust)      Type of product/option (e.g. balanced, growth)

Number of units      APIR code (if known)

Current market value      Currency if not AUD

Your share  %      Partner's share  %

If you (and/or your partner) have more than 2 managed investments, attach a separate sheet with details.

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

No ☒ **Go to 24**

Yes ☐ **Give details below**

**1** Name of company

Name of product

APIR code      Purchase price incl. instalments but not interest

Current value as per latest statement      Your share      Partner's share

**2** Name of company

Name of product


APIR code      Purchase price incl. instalments but not interest

Current value as per latest statement      Your share      Partner's share

If you (and/or your partner) have more than 2 funeral bonds/ funeral investments, attach a separate sheet with details.

**23** Have you (and/or your partner) 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 ☐  Attach a copy of each contract.



24 Please read this before answering the following question.

**YOU** should answer this question **ONLY** if you are over age pension age or claiming Age Pension.

**YOUR PARTNER** should answer this question **ONLY** if they are over age pension age or claiming Age Pension.

From 1 July 2017, the qualifying age for Age Pension increased from 65 years to 65 years and 6 months. The qualifying age rises by 6 months every 2 years, reaching 67 years by 1 July 2023. See table below.

Date of birth	Qualifying age at
1 July 1952 to 31 December 1953	65 years and 6 months
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 (or your partner) have any money invested in superannuation where the fund is still in accumulation phase and not paying a pension?

**Include:**

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

No ☐ Go to next question

Yes ☐ Give details below



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

**1** Name of institution/fund manager

Name of fund

Date of joining/investment      Current market value

Owned by: You ☐ Your partner ☐

**2** Name of institution/fund manager

Name of fund

Date of joining/investment      Current market value

Owned by: You ☐ Your partner ☐

*Continued*

**3** Name of institution/fund manager

Name of fund

Date of joining/investment      Current market value

Owned by: You ☐ Your partner ☐

If you (and/or your partner) have more than 3 superannuation investments, attach a separate sheet with details.

**25 Please 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)
- annuities
- defined benefit pension (e.g. ComSuper pension, State Super pension)
- superannuation pension (non-defined benefit).

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

No ☒ **Go to next question**

Yes ☐ **Give details below**



You (and/or your partner) will need to attach a **Details of income stream product** form (SA330) or a similar schedule, for each income stream product. The form or similar schedule must be completed by your product provider or the trustee of the Self Managed Superannuation Fund (SMSF) or Small APRA Fund (SAF) or the SMSF administrator.

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

**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 (and/or your partner) have more than 2 income stream products, attach a separate sheet with details.

**26 Do you (and/or your partner) have any money invested in, or do you receive income from, any other investments not declared elsewhere on this form?**

**Include:**

- all investments from outside Australia (including superannuation) not declared elsewhere on this form.

**Do NOT include:**

- income from real estate in or outside Australia, private trusts, private companies or business
- social security payments
- an account used exclusively for funding from the National Disability Insurance Scheme.

No ☒ **Go to next question**

Yes ☐ **Give details below**



Attach a copy of a document which gives details for each investment.

**1 Type of investment**

Name of organisation/company

Current value of investment

Income received in last 12 months

Currency if not AUD

Your share

 %

Partner's share

 %

**2 Type of investment**

Name of organisation/company

Current value of investment

Income received in last 12 months

Currency if not AUD

Your share

 %

Partner's share

 %

If you (and/or your partner) have more than 2 investments, attach a separate sheet with details.

**27** Do you (or your partner) receive payments from sources other than Centrelink income support payments?


**For example:**

- a payment from Department of Veterans' Affairs (DVA), **or**
- New Enterprise Incentive Scheme (NEIS) Allowance.

**Do NOT include** Parental Leave Pay or Dad and Partner Pay as we will include this for you.

No ☒ Go to next question

Yes ☐ Give details below

 Attach a copy of a letter or other document(s) that shows the reference number and details for the payment (other than payments made by us).

**1** Type of payment

Who pays it?

Reference number  
(if known)

Date commenced  
(if known)

Paid to: You ☐ Your partner ☐

**2** Type of payment

Who pays it?

Reference number  
(if known)

Date commenced  
(if known)

Paid to: You ☐ Your partner ☐

If you (and/or your partner) receive more than 2 payments, attach a separate sheet with details.


**28** Do you (and/or your partner) receive payments from an authority or agency outside Australia?

**Include** pensions from other countries, benefits, allowances, superannuation, compensation and war related payments.

**Note:** You must include details of pensions, allowances and other payments even if they are not taxable in the country of payment.

No ☒ Go to next question

Yes ☐ Give details below

 Attach a copy of a document from the issuing authority or agency which gives details including the amount in the foreign currency (e.g. latest pension certificate) for each payment.

**1** Type of payment

Country which pays it?

Authority or agency which pays it?

Date commenced  
(if known)

Paid to: You ☐ Your partner ☐

**2** Type of payment

Country which pays it?

Authority or agency which pays it?

Date commenced  
(if known)

Paid to: You ☐ Your partner ☐

If you (and/or your partner) receive more than 2 payments from an authority or agency outside Australia, attach a separate sheet with details.

**29** 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 (e.g. granny flat).

**Do NOT include** immediate family members (son, daughter, parent/guardian).

No ☒ Go to next question

Yes ☐ Give details below

**1** Name of person

Relationship to you	Number of meals you provide each day
<input type="text"/>	<input type="text"/>

Amount paid per fortnight	Date started paying
\$ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**2** Name of person

Relationship to you	Number of meals you provide each day
<input type="text"/>	<input type="text"/>

Amount paid per fortnight	Date started paying
\$ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) receive money from more than 2 people living with you, attach a separate sheet with details.

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

**Do NOT include** compensation, insurance or damages lump sum payments.

No ☐ Go to next question

Yes ☐ Give details below

Type of lump sum

Who paid it?

Amount paid	Date paid
\$ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Who received this lump sum payment? You ☐ Your partner ☐

If you (and/or your partner) have received more than 1 lump sum payment, attach a separate sheet with details.

**31** Do you (and/or your partner) receive any payments from other sources that you have not already advised us about on this form?


**Include:**

- gratuities
- match or sporting payments
- other income or payments from other countries
- payment in kind, such as non-monetary payments for services
- scholarships, educational assistance or allowance
- any other income.

**DO NOT include** Parental Leave Pay or Dad and Partner Pay.

No ☒ Go to next question

Yes ☐ Give details below

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

**2** Type of payment

Who pays it?

Amount per fortnight	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you (and/or your partner) receive more than 2 types of payments, attach a separate sheet with details.

**32** 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 and shares in private companies.

No ☒ Go to next question

Yes ☐ Give details below

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

Date given or sold

What it was worth

What you got for it

Your share

Partner's share

Was this gift to a Special Disability Trust (SDT)?

No ☐ Yes ☐

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

Date given or sold

What it was worth

What you got for it

Your share

Partner's share

Was this gift to a Special Disability Trust (SDT)?

No ☐ Yes ☐

If you (and/or your partner) have given away or sold for less than its market value more than 2 items, attach a separate sheet with details.

**33** In the last 12 months have you (and/or your partner) borrowed an amount which is secured against your home?

**Include:**

- Home Equity Conversion Loan
- Reverse Equity Mortgage.

**Do NOT include:**

- a mortgage taken out to purchase your home.

No ☒ Go to next question

Yes ☐ Give details below



Attach a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

Address

Postcode

Entered into by: You ☐ Your partner ☐

If you (and/or your partner) have more than 1 loan, attach a separate sheet with details.

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

**Include** taxi plates, time shares, racehorses, greyhounds, travellers cheques, cyber currency (e.g. bitcoin), collectables (e.g. stamps, coins, wine, art, antiques), commercial licences (e.g. fishing, hunting).

**Do NOT include** an account used exclusively for funding from the National Disability Insurance Scheme.

No ☒ Go to next question

Yes ☐ Give details below

**1** Description of asset

Current market value

Amount owed

Currency if not AUD

Your share

Partner's share

%

%

**2** Description of asset

Current market value

Amount owed

Currency if not AUD

Your share

Partner's share

%

%

If you (and/or your partner) have more than 2 other assets, attach a separate sheet with details.

**35** Please 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 control of 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 APRA Fund.

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 40

Yes ☐ Go to next question

**36** Is the private trust now vested?

No ☐ Go to 38

Yes ☐



You will need to provide a copy of evidence of the vesting.

► Go to next question

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

No ☐ Go to 40

Yes ☐ Go to next question

**38** Have you told us about this private trust before?

No ☐ Go to next question

Yes ☐ Go to 40

**39** Is the private trust a Special Disability Trust (SDT)?

No ☐



You will need to complete and attach a **Private Trust** form (Mod PT). If you do not have this form, go to [humanservices.gov.au/forms](https://humanservices.gov.au/forms)

Yes ☐



You will need to complete and attach a **Special Disability Trust** form (Mod SDT) if this has not already been done. If you do not have this form, go to [humanservices.gov.au/forms](https://humanservices.gov.au/forms)

**40 Please 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.


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 44**

Yes ☐ **Go to next question**

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

No ☐ **Go to 43**


Yes ☐  You will need to provide a copy of evidence of deregistration.  
▶ **Go to next question**

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

No ☐ **Go to 44**

Yes ☐ **Go to next question**

**43 Have you told us about this private company before?**

No ☐  You will need to complete and attach a **Private Company form (Mod PC)**. If you do not have this form, go to **humanservices.gov.au/forms**  
▶ **Go to next question**


Yes ☐ **Go to next question**

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

**Include:**

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

No ☒ **Go to next question**

Yes ☐  You will need to complete and attach a **Business details form (Mod F)**. If the business owns real estate you will also need to complete and attach a **Real estate details form (Mod R)** for each property. If you do not have these forms, go to **humanservices.gov.au/forms**


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

No ☒ **Go to 50**

Yes ☐ **Go to next question**


**46 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 attach a **Real estate details form (Mod R)**. If you do not have this form, go to **humanservices.gov.au/forms**  
▶ **Go to next question**

**47 Is the home you (and/or your partner) own on a block of land larger than 2 hectares (5 acres)?**

No ☒ **Go to next question**

Yes ☐  You will need to complete and attach a **Real estate details form (Mod R)**. If you do not have this form, go to **humanservices.gov.au/forms**  
▶ **Go to 49**

**48 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 attach a **Real estate details form (Mod R)**. If you do not have this form, go to **humanservices.gov.au/forms**



49 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 attach a **Business details** form (Mod F) and a **Real estate details** form (Mod R). If you do not have these forms, go to [humanservices.gov.au/forms](http://humanservices.gov.au/forms)

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

No ☒ Go to 52

Yes ☐ Go to next question

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

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

52 Please read this before answering the following question.

**Include:**

- workers' compensation/damages as a result of a work injury
- third party damages as a result of a motor vehicle accident
- personal accident and sickness insurance or income replacement insurance
- sporting injury compensation
- public liability compensation
- medical negligence compensation
- damages paid to victims of crime or as a result of criminal injuries.

Have you (or your partner) ever **CLAIMED** or are you (or your partner) **ABLE TO CLAIM** compensation, insurance and/or damages?

No ☒ Go to next question

Yes ☐ Go to 54

53 Are you (and/or your partner) **RECEIVING** or have you (and/or your partner) **EVER BEEN PAID** compensation, insurance and/or damages?

No ☒ Go to 55

Yes ☐ Go to next question

54 Have you told us about these payments before?

No ☐ You will need to complete and attach a **Compensation and damages** form (Mod C). If you do not have this form, go to [humanservices.gov.au/forms](http://humanservices.gov.au/forms)  
Go to next question

Yes ☐ Go to next question

55 Who should we contact if we require more details about your answers on this **Income and Assets** form?

Myself ☒

My partner ☐ Go to 57

My nominee ☐

My accountant/financial adviser or other person ☐ Go to next question

56 Please give contact details of the accountant/financial adviser/other person.

Full name

Address

Postcode

Phone number



**57** Which of the following forms, documents and other attachments are you (and/or your partner) providing with this form?

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

Where you are asked to supply documents, please attach copies, as detailed in the attach checklist, below.

- Attach copies of the 2 most recent payslips from each employer ☒

*(If you answered Yes at **question 8**)*
- Copies of fringe Benefit details ☐

*(If you answered Yes at **question 9**)*
- Seasonal, Contract and Intermittent Work Details** form (SU496) ☒

*(If you answered Yes at **question 11**)*
- Copies of insurance policy documents and latest statements ☐

*(If you answered Yes at **question 13**)*
- Copies of documents showing balances for bank, building society and credit union accounts ☒

*(if required for **question 16**)*
- Copies of investment bond/debenture documents ☐

*(If you answered Yes at **question 17**)*
- Copies of money on loan documents (if available) ☐

*(If you answered Yes at **question 18**)*
- Copies of share certificates or latest statement for each shareholding LISTED on a stock exchange ☐

*(If you answered Yes at **question 19**)*
- Copies of share certificates or latest statement for each shareholding NOT Listed on a stock exchange ☐

*(If you answered Yes at **question 20**)*
- Copies of managed investment certificates or similar documents ☐

*(If you answered Yes at **question 21**)*
- Copy of funeral service contract ☐

*(If you answered Yes at **question 23**)*
- Copies of latest statements for retirement savings accounts and superannuation funds, financial statement including income tax return and member statement for SMSF and SAF funds ☐

*(If you answered Yes at **question 24**)*
- Latest schedules for income stream products or **Details of income stream product** form (SA330) ☐

*(If you answered Yes at **question 25**)*
- Copies of documents with details of investments ☐

*(If you answered Yes at **question 26**)*
- Copies of letters/documents with details of other Australian government payments ☐

*(If you answered Yes at **question 27**)*
- Copies of documents with details of payments by authorities or agencies outside Australia ☐

*(If you answered Yes at **question 28**)*
- Copies of the most recent statements/certificates with details of other payments ☐

*(If you answered Yes at **question 31**)*

**57** *Continued*

- Copy of the loan agreement or contract ☐

*(If you answered Yes at **question 33**)*
- Copies of evidence of the vesting of the private trust ☐

*(If you answered Yes at **question 36**)*
- Private Trust** form (Mod PT) ☐

*(If you answered No at **question 39**)*
- Special Disability Trust** form (Mod SDT) ☐

*(If you answered Yes at **question 39**)*
- Copies of evidence of the deregistration of the private company ☐

*(If you answered Yes at **question 41**)*
- Private Company** form (Mod PC) ☐

*(If you answered No at **question 43**)*
- Business details** form (Mod F) and a **Real estate details** form (Mod R) ☐

*(If you answered Yes at **question 44**)*
- Real estate details** form (Mod R) for your home ☐

*(If you answered Yes at **question 46, question 47 or question 48**)*
- Business details** form (Mod F) and a **Real estate details** form (Mod R) ☐

*(If you answered Yes at **question 49**)*
- Real estate details** form (Mod R) for each property ☐

*(See **question 51**)*
- Compensation and damages** form (Mod C) ☐

*(If you answered No at **question 54**)*

**Questions continued ►**

**Privacy and your personal information**

Your personal information is protected by law (including the *Privacy Act 1988*) and is collected by the Australian Government Department of Human Services for the assessment and administration of payments and services. This information is required to process your application or claim.

Your information may be used by the department, or given to other parties where you have agreed to that, or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which the department will manage your personal information, including our privacy policy, at [humanservices.gov.au/privacy](http://humanservices.gov.au/privacy)

**59 Statement****I declare that:**

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

**I understand that:**

- giving false or misleading information is a serious offence.
- 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.
- the Australian Government Department of Human Services can make relevant enquiries to make sure I receive the correct entitlement.
- I must notify the Australian Government Department of Human Services of any changes to this information **within 14 days** of the change(s) occurring.

Your signature



Date

11 / 04 / 2018

Your partner's signature



Date

/ /