Australian Government
Australian Taxation Office

Application for refund of franking credits for **individuals** 2008

1 July 2007 to 30 June 2008

For individuals who do not need to lodge a tax return

You must read the publication *Refund of franking credits instructions and application for individuals 2008* before you complete this application. Please print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box. Print [X] in appropriate boxes.

TEAR ALONG DOTTED LINE

1 Your tax file number (TFN)

See the **Privacy** note in *Your declaration* on the next page.

If you do not have a TFN, or you are unsure, see page 3 in the instructions.

2 Were you an Australian resident for the whole period 1 July 2007 to 30 June 2008?

See page 3 in the instructions if you are unsure.

YES ☐

If you were not an Australian resident for this whole period, you **cannot** use this application – see page 3 in the instructions for more information.

3 Your sex

Male ☐ Female ☐

4 Your name

Print your full name.

Title – for example, Mr, Mrs, Ms, Miss

Surname or family name

Given names

Has any part of your name changed since you last gave us your details?

NO ☐ YES ☐ → Previous surname

If lodging by phone and you printed [X] in the YES box, see page 3 in the instructions.

5 Your postal address

Print the address where you want your mail sent.

Suburb or town

State Postcode Country if not Australia

Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO ☐ YES ☐

If lodging by phone and you printed [X] in the YES box, see page 3 in the instructions.

6 Is your home address different from your postal address?

NO ☐ Read on.

YES ☐ Print your home address.

Suburb or town

State Postcode Country if not Australia

7 Your date of birth

DAY MONTH YEAR

8 Your daytime phone number – if we need to ask you about your application, it is quicker by phone.

Area code Phone number

9 Your spouse's name

If you had more than one spouse during 2007–08, print the name of your latest spouse.

Surname or family name

Given names

10 Do you want your refund paid directly into your financial institution account?

See page 3 in the instructions for more information.

NO ☐ Go to item **11**.

YES ☐ Fill in the BSB number, account number and account name below.

BSB number
Must be six digits ☐☐☐☐☐☐ Account number ☐☐☐☐☐☐☐☐☐

Account name – for example, JQ Citizen. Do not show the account type, such as cheque, savings, mortgage offset.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

11 Dividends

If you have more than one dividend or distribution statement, see pages 3–5 in the instructions.

Did you receive any dividend distributions from a managed fund or Australian franking credits from a New Zealand company?
See page 3 in the instructions.

YES ☐

Do not show cents.

Unfranked amount **S** ☐,☐☐☐·00

Franked amount **T** ☐,☐☐☐·00

Franking credit **U** ☐,☐☐☐·00

Show dollars and cents.

Tax file number amounts withheld from dividends **V** ☐,☐☐☐·☐☐

TOTAL DIVIDEND INCOME **Add up all the amounts at S, T and U.** $ ☐,☐☐☐·00

IS YOUR APPLICATION COMPLETE?

Make sure you have completed your application correctly. Errors may delay the processing of your application.

Before you sign *Your declaration* below, check that you have:

- ☐ written your TFN on page 1 of this application to avoid delays in processing
- ☐ filled in all your personal details on page 1
- ☐ filled in your financial institution account details on this page if you want your refund paid directly into your financial institution account
- ☐ correctly completed all of your dividend details for 2007–08.

YOUR DECLARATION

Please sign the declaration below.

Privacy

The Tax Office is authorised by the *Taxation Administration Act 1953* to request you to quote your tax file number (TFN). It is not an offence not to quote your TFN. However, your application may be delayed if you do not quote your TFN.

The Tax Office is also authorised by the *Income Tax Assessment Act 1936*, the *Income Tax Assessment Act 1997* and the *A New Tax System (Family Assistance) (Administration) Act 1999* to ask for the other information on this application. We need this information to help us to administer the taxation laws.

We may give this information to other government agencies as authorised in taxation law – for example, benefit payment agencies such as Centrelink, the Department of Education, Employment and Workplace Relations, and the Department of Families, Housing, Community Services and Indigenous Affairs; law enforcement agencies such as state and federal police; and other agencies such as the Child Support Agency, the Australian Bureau of Statistics and the Reserve Bank of Australia.

Read and sign the declaration after completing your application. Even though someone else may have helped you to complete your application, you are responsible for the information provided and you must sign the declaration.

I declare that:

- all the information I have given on this application is true and correct
- I do not need to lodge a tax return and have no tax payable for the 2007–08 income year
- I have shown the total of my dividend income and franking credits received during the 2007–08 income year AND
- I have the necessary records to support my application for a refund of franking credits.

IMPORTANT

The Tax Office may confirm with the payer who sent you your dividend or distribution statement that the information you have provided on this application is correct. The tax law imposes heavy penalties for giving false or misleading information.

If lodging by phone, record your receipt number here.

Receipt number ☐☐☐☐☐☐☐☐☐☐

FOR YOUR APPLICATION TO BE VALID YOU MUST SIGN BELOW.

Date DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐

Australian Government
Australian Taxation Office

Application for refund of franking credits for **individuals** 2008

1 July 2007 to 30 June 2008

For individuals who do not need to lodge a tax return

You must read the publication *Refund of franking credits instructions and application for individuals 2008* before you complete this application. Please print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box. Print [X] in appropriate boxes.

TEAR ALONG DOTTED LINE

1 Your tax file number (TFN)

See the **Privacy** note in *Your declaration* on the next page.

If you do not have a TFN, or you are unsure, see page 3 in the instructions.

2 Were you an Australian resident for the whole period 1 July 2007 to 30 June 2008?

See page 3 in the instructions if you are unsure.

YES ☐

If you were not an Australian resident for this whole period, you **cannot** use this application – see page 3 in the instructions for more information.

3 Your sex

Male ☐ Female ☐

4 Your name

Print your full name.

Title – for example, Mr, Mrs, Ms, Miss

Surname or family name

Given names

Has any part of your name changed since you last gave us your details?

NO ☐ YES ☐ → Previous surname

If lodging by phone and you printed [X] in the YES box, see page 3 in the instructions.

5 Your postal address

Print the address where you want your mail sent.

Suburb or town

State Postcode Country if not Australia

Has this address changed since completing your last tax return?

Fill in the appropriate box then read on.

NO ☐ YES ☐

If lodging by phone and you printed [X] in the YES box, see page 3 in the instructions.

6 Is your home address different from your postal address?

NO ☐ Read on.

YES ☐ Print your home address.

Suburb or town

State Postcode Country if not Australia

7 Your date of birth

DAY MONTH YEAR

8 Your daytime phone number – if we need to ask you about your application, it is quicker by phone.

Area code Phone number

9 Your spouse's name

If you had more than one spouse during 2007–08, print the name of your latest spouse.

Surname or family name

Given names

10 Do you want your refund paid directly into your financial institution account?

See page 3 in the instructions for more information.

NO ☐ Go to item **11**.

YES ☐ Fill in the BSB number, account number and account name below.

BSB number
Must be six digits ☐☐☐☐☐☐ Account number ☐☐☐☐☐☐☐☐☐

Account name – for example, JQ Citizen. Do not show the account type, such as cheque, savings, mortgage offset.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

11 Dividends

If you have more than one dividend or distribution statement, see pages 3–5 in the instructions.

Did you receive any dividend distributions from a managed fund or Australian franking credits from a New Zealand company?
See page 3 in the instructions.

YES ☐

Do not show cents.

Unfranked amount **S** ☐,☐☐☐·00

Franked amount **T** ☐,☐☐☐·00

Franking credit **U** ☐,☐☐☐·00

Show dollars and cents.

Tax file number amounts withheld from dividends **V** ☐,☐☐☐·☐☐

TOTAL DIVIDEND INCOME **Add up all the amounts at S, T and U.** $ ☐,☐☐☐·00

IS YOUR APPLICATION COMPLETE?

Make sure you have completed your application correctly. Errors may delay the processing of your application.

Before you sign *Your declaration* below, check that you have:

- ☐ written your TFN on page 1 of this application to avoid delays in processing
- ☐ filled in all your personal details on page 1
- ☐ filled in your financial institution account details on this page if you want your refund paid directly into your financial institution account
- ☐ correctly completed all of your dividend details for 2007–08.

YOUR DECLARATION

Please sign the declaration below.

Privacy

The Tax Office is authorised by the *Taxation Administration Act 1953* to request you to quote your tax file number (TFN). It is not an offence not to quote your TFN. However, your application may be delayed if you do not quote your TFN.

The Tax Office is also authorised by the *Income Tax Assessment Act 1936*, the *Income Tax Assessment Act 1997* and the *A New Tax System (Family Assistance) (Administration) Act 1999* to ask for the other information on this application. We need this information to help us to administer the taxation laws.

We may give this information to other government agencies as authorised in taxation law – for example, benefit payment agencies such as Centrelink, the Department of Education, Employment and Workplace Relations, and the Department of Families, Housing, Community Services and Indigenous Affairs; law enforcement agencies such as state and federal police; and other agencies such as the Child Support Agency, the Australian Bureau of Statistics and the Reserve Bank of Australia.

Read and sign the declaration after completing your application. Even though someone else may have helped you to complete your application, you are responsible for the information provided and you must sign the declaration.

I declare that:

- all the information I have given on this application is true and correct
- I do not need to lodge a tax return and have no tax payable for the 2007–08 income year
- I have shown the total of my dividend income and franking credits received during the 2007–08 income year AND
- I have the necessary records to support my application for a refund of franking credits.

IMPORTANT

The Tax Office may confirm with the payer who sent you your dividend or distribution statement that the information you have provided on this application is correct. The tax law imposes heavy penalties for giving false or misleading information.

If lodging by phone, record your receipt number here.

Receipt number ☐☐☐☐☐☐☐☐☐☐

FOR YOUR APPLICATION TO BE VALID YOU MUST SIGN BELOW.

Date DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐

MORE INFORMATION

INTERNET

- For general tax information and to download publications and rulings, visit **www.ato.gov.au**

INFOLINES

- **Phone lodgment** **13 28 65**
  Lodge your application for refund of franking credits by phone 24 hours a day, seven days a week.
- **Progress of refunds** **13 28 65**
  Check the progress of your refund of franking credits. This is an automated self-help service available 24 hours a day, seven days a week. You will need to key in your tax file number (TFN) using your phone keypad.
  If you sent your application by ordinary post, wait seven weeks before phoning to check on the progress of your application.
  If you lodged your application by phone, wait three weeks before phoning.
- **Personal tax** **13 28 61**
  Individual income tax and general personal tax enquiries, including:
  – refund of franking credits
  – TFN
  – whether you need to lodge a tax return
  – request for extra copies of the application for refund of franking credits
  – whether you are an Australian resident for tax purposes
- **Business** **13 28 66**
  General business tax enquiries including capital gains tax, GST rulings, Australian business number (ABN), pay as you go (PAYG) instalments, business deductions, activity statements (including lodgment and payment), accounts and business registration (including ABN and TFN), dividend and royalty withholding tax
- **Superannuation** **13 10 20**

OTHER SERVICES

- **Translating and Interpreting Service** **13 14 50**
  If you do not speak English well and want to talk to a tax officer, phone the Translating and Interpreting Service for help with your call.
- **Hearing or speech impairment**
  If you are deaf or have a hearing or speech impairment, you can phone the Tax Office through the **National Relay Service**:
  – If you are a TTY or modem user, phone **13 36 77** and ask for the number you want. For 1800 free call numbers, phone **1800 555 677** and ask for the number you want.
  – If you are a voice-only (speak and listen) user, phone **1300 555 727** and ask for the number you want. For 1800 free call numbers, phone **1800 555 727** and ask for the number you want.

PUBLICATIONS

To get any Tax Office publication (including taxation rulings, practice statements and forms):

- visit our website at **www.ato.gov.au/publications**
- phone our Publications Distribution Service on **1300 720 092**
- visit one of our shopfronts.

TAX HELP

Tax Help is a free and confidential service for people on low incomes. People who use Tax Help include seniors, people from non-English speaking backgrounds, people with a disability, Aboriginal people, Torres Strait Islander people, and students.

We train and support this network of community volunteers to help you.

If you need assistance with completing your application, there are Tax Help centres throughout Australia. If you want to visit one of the trained volunteers, you need to make an appointment first. When you visit, you will need to bring:

- this publication, *Refund of franking credits instructions and application for individuals 2008*, and
- all your dividend and distribution statements.

For more information or to find your nearest Tax Help centre, phone us on **13 28 61**.

FEEDBACK

Reader feedback helps us to improve the information we provide. If you have any feedback about this publication, write to:

The Editor
Publishing Coordination
Marketing and Education
Micro Enterprises and Individuals
Australian Taxation Office
PO Box 900
CIVIC SQUARE ACT 2608

As this is a publications area only, any tax matters will be passed on to a technical area. Alternatively, you can phone our Personal Infoline on **13 28 61** for help.

If you do not speak English well and need help from the Tax Office, phone the Translating and Interpreting Service (TIS) on 13 14 50. TIS staff can assist with interpreting in over 120 languages.

إذا كنت لا تجيد التكلم باللغة الإنكليزية وتحتاج لمساعدة من مكتب الضرائب ، اتصل بخدمة الترجمة الخطية والشفهية على الرقم 131450. يتوفر لدى هذه الخدمة مترجمون في أكثر من مائة وعشرين لغة.
ARABIC

如你不懂英語但需稅務局協助，請致電 131450 翻譯及傳譯服務處（TIS），翻譯及傳譯服務處的職員可提供超過 120 種語言的傳譯服務。 **CHINESE**

Ako imate poteškoća s engleskim, a potrebna vam je pomoć od Poreznog ureda, nazovite Službu prevoditelja i tumača (Translating and Interpreting Service - TIS) na 13 14 50. Osoblje TIS-a može pružiti pomoć u tumačenju na više od 120 jezika. **CROATIAN**

درصورتیکه به لسان انگلیسی خوب صحبت کرده نمی توانید و ضرورت به کمکِ اداره مالیات (Tax Office) دارید، به خدمات ترجمانی تحریری و شفاهی (TIS) به نمبر 131450 تیلفون کنید. موظفین TIS می توانند در ترجمانی شفاهی به بیشتر از 120 لسان کمک کنند.
DARI

اگر به انگلیسی خوب صحبت نمی کنید و نیاز به کمکِ اداره مالیات (Tax Office) دارید، به خدمات ترجمه کتبی و شفاهی (TIS) به شماره 131450 تلفن کنید. کارکنان TIS می توانند در ترجمه شفاهی به بیش از 120 زبان یاری دهند.
FARSI

Αν δεν μιλάτε καλά Αγγλικά και χρειάζεστε βοήθεια από την Εφορία, τηλεφωνήστε στην Υπηρεσία Μετάφρασης και Διερμηνείας (TIS) στο 13 14 50. Το προσωπικό της TIS μπορεί να βοηθήσει με διερμηνεία σε πάνω από 120 γλώσσες. **GREEK**

Se non parlate bene l'inglese e vi serve aiuto dall'Ufficio delle imposte, telefonate al Servizio traduzioni e interpreti (TIS) al numero 13 14 50. Il personale del TIS può offrirvi un servizio interpreti in oltre 120 lingue. **ITALIAN**

英語でお困りの方で、国税庁のサポートが必要な場合には、翻訳通訳サービス (TIS) 13 14 50 にお電話ください。TIS では、各種言語との通訳（120 ヶ国語以上）を提供しています。
JAPANESE

영어에 어려움이 있는 분이 국세청으로부터 도움이 필요한 경우, 번역 및 통역 서비스 (TIS) 13 14 50 번으로 전화하십시요. TIS 직원은 120 여개 언어의 통역을 도와 드립니다. **KOREAN**

Ако не зборувате добро англиски и ви треба помош од Даночната управа, телефонирајте во Службата за писмено и усмено преведување (Translating and Interpreting Service - TIS) на 13 14 50. Персоналот од TIS може да помогне со усмено преведување на над 120 јазици. **MACEDONIAN**

Если вы не говорите хорошо по-английски и нуждаетесь в помощи Налогового управления, звоните в Переводческую службу TIS по тел. 13 14 50. Сотрудники TIS могут помочь с устным переводом более чем на 120 языках. **RUSSIAN**

Ако не говорите добро енглески а потребна вам је помоћ Пореске управе, позовите Службу за превођење и тумачење (ТИС) на 13 14 50 . Особље ТИС-а пружа преводилачке услуге на више од 120 језика. **SERBIAN**

Si no habla bien el inglés y necesita ayuda de la Oficina de Impuestos, llame al Servicio de Traducción e Interpretación (Translating and Interpreting Service - TIS) al 13 14 50. El personal de TIS puede ayudar con la interpretación en más de 120 idiomas. **SPANISH**

หากท่านพูดภาษาอังกฤษได้ไม่คล่อง และต้องการความช่วยเหลือจากสำนักงานสรรพากร กรุณาติดต่อหน่วยบริการแปลและล่าม (Translating and Interpreting Service - TIS) ได้ที่โทรศัพท์ 13 14 50 เจ้าหน้าที่จาก TIS สามารถให้ความช่วยเหลือด้านงานล่ามได้มากกว่า 120 ภาษา **THAI**

İyi İngilizce konuşamıyorsanız ve Vergi Dairesi'nden yardıma ihtiyacınız varsa, Yazılı ve Sözlü Çeviri Servisi'ni (TIS) 13 14 50 numaralı telefondan arayın. TIS görevlileri 120'den fazla dilde sözlü tercüme yardımında bulunabilirler. **TURKISH**

Nếu không nói thạo tiếng Anh và cần Sở Thuế giúp đỡ, xin quý vị gọi điện cho Dịch Vụ Thông Phiên Dịch (TIS) theo số 13 14 50. Nhân viên của TIS có thể làm thông dịch cho trên 120 ngôn ngữ. **VIETNAMESE**