

**BOB LAZER TAXATION
P O BOX 450
Mt MARTHA Vic 3934
97010407**

**FOR THE OVER 60's
DO I NEED TO LODGE A TAX RETURN?**

1. Do you receive a Commonwealth Superannuation Admin payment? If yes, you need to lodge. If no, read on .
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2. Did anyone deduct tax from any source? If so, you need to lodge. If not, read on.
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3. Have you received dividends from shares which add to more than \$6000? If so, you need to lodge. If not, read on.
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4. Has any financial institution deducted TFN Tax from your receipts? If so, you may need to lodge. If not, read on.
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5. Now, please add up the following receipts :
 - (a) Age Pension.....
 - (b) Dividends from shares.....
 - (c) Franking credit from shares.....
 - (d) Trust or Managed Funds Distributions (Item 13 on Annual Fund Statements).....
 - (e) Net Capital Gains (Item 18 on Annual Fund Statements)
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 - (f) Profit from sale of shares or property (excluding primary residence).....
 - (g) Foreign Income (Item 20 on Annual Fund Statements)
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 - (h) Rental Income
 - (i) Employment Income (Personal Exertion)
\$.....

If this totals more than \$19462 if married, or \$22922 if single, you need to lodge. Please move to the "Tax Information Required" form and provide details.

If you are under these totals, you do not need to lodge.

However, if you had an amount at (c) go to our page headed "Application For a Refund of Franking Credits".