

The Queensland Government strongly recommends that Financial Advice is obtained prior to entering into a Salary Packaging Agreement.

> Who can apply?

If you are eligible for the Fringe Benefits Tax (FBT) exemption cap, you can salary package a range of Full FBT Benefit Items. This is applicable to employees of:

- Queensland Health (if you are working in and for a designated public hospital business area); or
- Queensland Ambulance Service; or
- Legal Aid Queensland; or
- Queensland Government Air (QGAIR)

Applications and requests could take 1-2 pay cycles to take effect.

For more information, read the appropriate booklets and factsheets at qld.smartsalary.com.au/fact-sheet-library.

> How does it work?



Step 1.

Complete all the steps needed to set up a Smartsalary account.



Step 2.

Email all documents to customersupport@smartsalary.com.au



Step 3.

We'll deduct the claim amount from your pre-tax salary



Step 4.

The claim amount will be paid to the nominated bank account

> Checklist

Follow this simple checklist to make sure your claim is correct and can be processed quickly.

- ✓ **Have an active Smartsalary salary packaging account.**
 - > If you do not have an active Smartsalary salary packaging account you will need to complete the Salary Packaging Application & Agreement Form.
- ✓ Read the appropriate **Booklets and Fact Sheets** on the website qld.smartsalary.com.au/fact-sheet-library
- ✓ **Attached the required supporting documents.**
- ✓ **Signed pages 4 and 5** and returned all pages of the **Mortgage Payments Claim Form.**
- ✓ Read the **terms and conditions**, visit qld.smartsalary.com.au.

> How to fill and sign this form

With a digital signature

1. Check that you have Adobe Acrobat PDF Reader to complete this form or download Adobe Acrobat PDF Reader.

> Click here to install: <https://get.adobe.com/reader/>

2. Download the Smartsalary form onto your desktop computer.
3. Fill in the details by typing into the field boxes and save the completed form.
4. Click the signature field to create and add your digital signature to the form.
5. Save and attach all pages.
6. Add any supporting documents.
7. Email the form to Smartsalary for processing.

Without a digital signature

1. Download the Smartsalary form onto your desktop computer.
2. Fill in the details by typing into the field boxes and save the completed form.
3. Print your form and sign the relevant pages.
4. Scan and attach all pages.
5. Add any supporting documents.
6. Email the form to Smartsalary for processing.

Important

- > Submit [all pages and supporting documents](#) to customersupport@smartsalary.com.au.
- > Forms cannot be processed without a signed declaration.

Continue to next page >

Queensland Government Claim Form - Mortgage Payments



Email completed forms to:
customersupport@smartsalary.com.au

Alternatively, mail to:

Smartsalary Pty Ltd
QLD-GOV Applications
GPO Box 4244
Sydney NSW 2001

Section A - Your details

Smartsalary account number	Employer
Given name(s)	Surname
Contact number	Payroll number

Note: Log in to your online Smartsalary account at qld.smartsalary.com.au to find your Smartsalary account number.

Section B - Payment details

Indicate the amount that you would like to be deducted from your pre-tax salary.

Total amount \$

Note: Smartsalary will make equal deductions and reimbursements over the number of pay periods remaining in the current FBT year and will automatically set up equal deductions and payments for the next FBT year.

Select an option on how you would like this amount to be paid?

Option 1: Claim reimbursements to your personal bank account (continue to Section C)

Option 2: Direct payments to your Mortgage Loan bank account (complete below and continue to Section C)

Bank Name	Name of Account Holder
BSB	Account Number



Important: If you pay off your mortgage during your salary packaging arrangement you are required to contact Smartsalary to update your account.

Section C - Your bank account details

Have your personal bank account details changed since you first applied for salary packaging?

No

Yes > Update your bank details through your Smartsalary account at qld.smartsalary.com.au.

Privacy notice

The salary packaging administrator is collecting your personal information on this form for the purpose of processing your salary packaging agreements. The salary packaging administrator will pass your personal information on to your agency's payroll section as part of the administration of your salary packaging agreements, Queensland Government Procurement in relation to the management of the salary packaging arrangement, and Queensland Treasury for auditing purposes. Your personal information will not be used for any other purpose or disclosed to any other third party, without your consent, unless authorised or required by law.

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Section D - Supporting documentation

Please attach the following documentation to this form when submitting to Smartsalary:

- Required supporting documentation for this claim** (e.g. mortgage statement); and
- Proof of payment to support your expense** (e.g. bank/loan statement)

Section E - Employee declaration

I hereby declare that:

- Any information I have provided in relation to this form, including information provided in supporting documents and communications to Smartsalary Staff (both written and verbal) is true, correct and complete to the best of my knowledge;
- I have read and understand the Salary Packaging Information Booklet and the relevant Fact Sheet available on the Smartsalary website;
- The attached invoice/s and/or receipt/s are for expenses incurred by me and have not and will not be claimed by me for any other tax deductible purpose and are budgeted for within my Salary Packaging Agreement;
- I have read, understand and agree to comply with Smartsalary Salary Packaging Terms and Conditions;
- I authorise Smartsalary to alter my deductions in accordance with the requirements of my salary packaging arrangement;
- I may sign my name physically or by using a certified electronic signature that verifies the date and time that I applied my electronic signature. By doing so, I consent to the terms and conditions applicable to this application; and
- Payments and/or reimbursements can only occur after sufficient funds have been deducted from my salary for the relevant benefit item.

Direct debit request declaration:

- I have read and understand the Direct Debit Service Agreement available on the Smartsalary website;
- I understand that upon cessation of my salary packaging account any amounts owed by me in relation to my salary package that has not been collected from my pay must be paid directly by me; and
- I hereby authorise Smartsalary (User ID 373142) to direct debit the bank account held by Smartsalary as my Personal Bank Account should there be amounts owing by me, in accordance with Smartsalary Terms and Conditions.

Signature: _____

(Click to insert digital signature)

Date: _____



Important: This section must be signed otherwise your claim will not be processed.

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Section F - Queensland Government declaration

I,
(Employee name)

employed by
(Employer name)

advise that

- (a) I have a loan facility under which I am the recipient of loan funds by way of housing mortgage for my principal place of residence
- (b) this facility enables funds to be redrawn under various circumstances provided for in the applicable housing mortgage documentation
- (c) I have informed/will inform my salary packaging administrator of any draw-down of the loan and the purpose to which it is to be put.

As a result, I hereby declare that where the salary packaging administrator makes payment under the salary packaging arrangements in satisfaction of any liability arising under the aforementioned housing mortgage, I will not seek to obtain a subsequent draw-down of any funds so paid from pre-tax income in respect of this loan facility unless:

- (a) such funds are also used for a valid purpose which is itself available in accordance with the Queensland Government approved list of salary packaging items
- (b) sufficient documentation is provided to my salary packaging administrator to substantiate such validity.

I acknowledge that the Queensland Government **strongly recommends** that I obtain independent financial advice prior to entering into, or changing the terms of, a salary packaging arrangement.

Signature: _____

(Click to insert digital signature)

Date: _____



Important: This section must be signed otherwise your claim will not be processed.

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