

# Queensland Government Claim Form - Financial Advisor Fees

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

## > Who can apply?

- Queensland Government employees can salary package Financial Adviser Fees.
- Only some financial adviser fees are considered as an Fringe Benefits Tax (FBT) "exempt" benefit item, while others are considered to be under the full FBT benefit item.

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](http://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](mailto: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](http://qld.smartsalary.com.au/fact-sheet-library).
- ✓ **Attached all supporting documents.**
- ✓ **Signed pages 4 and 5** and returned all pages of the **Financial Advisor Fees Claim Form**.
- ✓ Read the **terms and conditions**, visit [qld.smartsalary.com.au](http://qld.smartsalary.com.au).

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## > 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](mailto:customersupport@smartsalary.com.au) to [customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au).
- > Forms cannot be processed without a signed declaration.

*Continue to next page >*

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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](http://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 \$

GST amount \$

Over how many pays

**Note:** Smartsalary will make equal deductions and reimbursements/payments over the number of pay periods that you nominate.

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

**Option 1: Claim reimbursements to your personal account** (continue to Section D)

**Option 2: Direct payments to your Airport Lounge Membership provider** (complete below and continue to Section D)

Bank name

Name of account holder

BSB

Account number

Membership number

## 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](http://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.

**[qld.smartsalary.com.au](http://qld.smartsalary.com.au)**

Smartsalary Pty Ltd ACN 096 796 100 | GPO Box 4244, Sydney NSW 2001  
Tel: 1300 218 598 | Email: [customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au)

Page 3 of 5

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# Queensland Government

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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. valid tax invoice); and
- Proof of payment to support your expense** (e.g. receipt, bank statement, credit card statement etc.)

### Section F - 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;
- I understand that any work expenses reimbursed through salary packaging are not deductible in my personal income tax return; 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 G - Queensland Government declaration

I, .....  
(Employee name)

employed by .....  
(Employer name)

declare that the financial adviser fees being reimbursed to me or paid directly to:

(Name of licensed financial adviser, chartered accountant or certified practising accountant)

on my behalf during the period from (Start date) and (End date)

were not expenses incurred by me for initial advice in regard to drawing up an investment plan, but were expenses incurred solely in relation to reviewing the personal investment strategies and decisions arising from the investment plan received from my current financial adviser.

The expenses were incurred in the course of earning my assessable income, and therefore did not relate to matters such as superannuation, termination payments, redundancies, salary packaging arrangements, novated leases, trust funds, estate/retirement planning, etc.

I also declare that the percentage of those expenses incurred in earning my assessable income ..... per cent was and that I have not and will not claim these expenses as deductions in any income tax returns.

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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