

Queensland Government Claim Form - Professional Association Memberships



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 certain their professional association membership fees provided they are earning assessable income from the relevant trade, business or profession and where the principal activities of the association are negotiating and administering employment agreements (e.g. unions, Australian Medical Association) and/or providing professional development services (e.g. CPA Australia).

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 all supporting documents.**
- ✓ **Signed pages 4 and 5** and returned all pages of the **Professional Association Memberships 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.

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Alternatively, mail to:

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



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

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 \$

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 C)

Option 2: Direct payments to your Professional 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.

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

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

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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 etc.); and

Proof of payment to support your expense (e.g. receipt, bank statement, credit card statement etc.)

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.
- I understand that any work expenses reimbursed through salary packaging are not deductible in my personal income tax return.

No private use declaration

- The reimbursements made to me in the FBT year(s) coinciding with the date of reimbursement are expense payment benefits that are 100% related to my employment and which, under the 'otherwise deductible' rule, will have a taxable value of nil.

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)

declare that I am a member of
(Name of Professional Association)

and that the membership relates to the period from (Start date) to (End date).

My membership of this professional association is directly relevant to my current employment for the following reasons:

- 1.
- 2.
- 3.

Notes:

- Give sufficient information to demonstrate the extent to which the professional association membership expenses were incurred by you for the purpose of earning your assessable income.
- Please complete a declaration for each professional association of which you are a member and are claiming through salary packaging.

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