

Queensland Government Claim Form - Savings/ Investment Scheme



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 (FBT) exemption cap, you can salary package a range of Full FBT Benefit Items. This is applicable to employees of:

- a) Queensland Health (if you are working in and for a designated public hospital business area); or
- b) Queensland Ambulance Service; or
- c) Legal Aid Queensland; or
- d) 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 all supporting documents.
- ✓ **Signed page 4 and 5** and returned all pages of the **Savings/Investment Scheme Claim Form**.
- ✓ Read the **terms and conditions**, visit 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.
- > 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.

Direct payments to your provider

Bank name

Name of account holder

BSB

Account number

Customer payment reference

Section C - 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.)

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Section D - 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 E - Queensland Government declaration

I,
(Employee name)

employed by
(Employer name)

advise that I have chosen to package a savings/investment plan as part of my salary packaging agreement.

I confirm that this scheme meets the following terms:

- It is a managed investment fund which is structured on a unitised basis.
- The investment insurance product is provided by an approved life company and
 - i) has a minimum term of not less than 10 years
 - ii) is held under a trust pursuant to which: the policy is not able to be terminated within 10 years, and the premiums paid on the policy are not able to be accessed, borrowed against or withdrawn within 10 years except in special circumstances involving serious financial difficulties suffered by the employee
 - iii) may provide for a payment in respect of death or disability
 - iv) is treated as 'paid up' if the premium payments are discontinued for any reason and will be continued so that the policy will be in force for at least 10 years before the proceeds are paid out
 - v) has no direct or indirect loan back arrangements attached to it.

I understand that if these terms are breached, except under specific circumstances such as financial hardship, that the Australian Taxation Office may consider the salary packaged amounts salary and subject to income tax or fringe benefits tax. I understand that if this occurs I am liable for the tax payable.

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.

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

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