

Employment termination payments questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Address _____

1. Have you received an ETP during the income year? YES/NO

If **no**, you do not have to complete the remainder of this questionnaire and no amount gets shown at **Item 4** of the income tax return form.

2. If **yes**, please provide details on when you ceased employment and the circumstances surrounding the cessation of your employment: (e.g., retirement, redundancy etc.). YES/NO

| Circumstances | Date |
|---------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

3. Did you receive a payment from an employer on termination of your employment during the income year that included any of the following?

- (a) Unused annual leave YES/NO
- (b) Unused long service leave YES/NO
- (c) A payment in lieu of notice YES/NO
- (d) Unused sick leave YES/NO
- (e) Unused RDOs YES/NO
- (f) A "golden handshake" YES/NO
- (g) A genuine redundancy payment YES/NO
- (h) A payment in respect of an early retirement scheme YES/NO
- (i) A pension or annuity YES/NO
- (j) An invalidity payment YES/NO
- (k) CGT exempt amount (under Subdivision 152-D). YES/NO
- (l) Other – please specify: YES/NO

4. If you have received an employment termination payment, have you received the following documents?

- A payment summary
- ETP payment summary/s

YES/NO

YES/NO

If you have not received this documentation then you should contact your employer. This is because these documents are necessary before your income tax return can be lodged.

Taxpayer’s employment termination payments declaration

- A. I confirm that the above details in relation to employment termination payments are correct;
- B. My tax agent has explained to me the law and income tax lodgment requirements as they relate to employment termination payments; and
- C. I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.

Signed

Dated