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.

1. If **yes**, please provide details on when you ceased employment and the **YES/NO**

circumstances surrounding the cessation of your employment:

(e.g., retirement, redundancy etc.).

 **Circumstances Date**

1. Did you receive a payment from an employer on termination of your

employment during the income year that included any of the following?

1. Unused annual leave **YES/NO**
2. Unused long service leave **YES/NO**
3. A payment in lieu of notice **YES/NO**
4. Unused sick leave **YES/NO**
5. Unused RDOs **YES/NO**
6. A “golden handshake” **YES/NO**
7. A genuine redundancy payment **YES/NO**
8. A payment in respect of an early retirement scheme **YES/NO**
9. A pension or annuity **YES/NO**
10. An invalidity payment **YES/NO**
11. CGT exempt amount (under Subdivision 152-D). **YES/NO**
12. Other – please specify: **YES/NO**

1. If you have received an employment termination payment, have you

received the following documents?

* An employment income statement **YES/NO**
* ETP payment summary/s **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

1. I confirm that the above details in relation to employment termination payments are correct;
2. My tax agent has explained to me the law and income tax lodgment requirements as they relate to employment termination payments; and
3. 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**