

# Information Sheet for Salary Package Application Form

Note: the FBT year runs 1<sup>st</sup> April – 31<sup>st</sup> March

What type of evidence / substantiation do I need to provide to receive my benefits?

Capped benefit types (GST free) to the value of \$16048.50.

## **Mortgage**

- A copy of your payment schedule or letter from your loan provider stating the minimum payment required.
- Frequency of payments e.g. monthly, fortnightly etc.
- If salary packaged funds are being directly transferred to a loan account no minimum repayment is required; however a current statement is required showing the loan is still current.

## **Personal Loan**

- A copy of your payment schedule or letter from your loan provider stating the minimum payment required.
- Frequency of payments, e.g. Monthly, fortnightly etc.
- If salary packaged funds are being directly transferred to a loan account no minimum repayment is required; however a current statement is required showing the loan is still current.

## **Property Rental**

- A copy of your agency or landlord's agreement stating the amount of rent, or a letter from your landlord.
- Frequency of payments, e.g. Monthly, fortnightly etc.

## **Line of Credit (interest only)**

- Statement of mortgage with interest charges/payments.

## **Credit Card**

- Copy of statement (summary page) with total of new purchases. Aiiim calculates the evidence by calculating the total purchases made on a statement.
- Payments made on a credit card are not accepted.
- An outstanding balance is not accepted.
- Cash withdrawals and/or fees are not accepted.

## **Health Insurance**

- Copy of insurance policy with fee payable.
- Frequency of payments, e.g. monthly, fortnightly etc.

**Life Insurance**

- Copy of insurance policy with fee payable.
- Frequency of payments, e.g. monthly, fortnightly etc.

**Rates (council and water)**

- Copy of rates notice – paid.

**School Fees**

- Invoice showing cost of expense in transaction detail.
- Payments made to the school are not accepted.
- An outstanding balance is not accepted.

**Child Care**

- Copy of statement or invoices paid.

**HELP (previously HECS) debt**

- Invoice showing current debt.

**International Travel**

- Copy of paid invoices.
- Airline tickets.
- International tours and/or activities.
- Items that are purchased overseas and are brought to Australia are not acceptable.

**Medical Expenses**

- Invoicing showing cost of expense in transaction detail.

**Salary Packaging Card**

- No need to provide substantiation.
- (GST inclusive) to the value of \$16048.50

**Insurance (contents, home and vehicle)**

- Copies of insurance policies with fee payable
- Frequency of payments e.g. monthly, fortnightly, etc.

**Living expenses e.g. grocery bills**

- Grocery bills, etc.

**Utility Expenses**

- Monthly / bi-monthly / quarterly utilities bills.

**Vehicle Registration**

- Copy of any paid invoices.