

Remote Area Mortgage Interest Benefit Application and Claim Form

- + Complete this form if you are claiming mortgage interest costs in relation to a remote area property.
- + If you live and work in a remote area you can salary package costs you and/or your spouse have paid in relation to mortgage interest.

I am a new customer (please complete section A)


I am an existing customer (please complete section B)

Get in Touch


We'd love to hear from you

If you have a question about this form, or any of your Salary Packaging Employee Benefits:

 1300 40 80 46

 customersupport@salarypackagingplus.com.au

 www.salarypackagingplus.com.au

 Level 12, 717 Bourke St, Docklands VIC 3008

Section A - Your Details

Please complete all applicable fields. Please ensure to provide a home contact in case your circumstances change.

Title	<input type="text"/>	Legal Name	<input type="text"/>								
Gender	<input type="text"/>	Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Payroll ID	<input type="text"/>		Preferred Name	<input type="text"/>							
Employer	<input type="text"/>		Start date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Department/Site	<input type="text"/>		Pay Cycle Name (if known)	<input type="text"/>							
Employment Status	<input type="checkbox"/> Full/Part Time	<input type="checkbox"/> Casual	<input type="checkbox"/> Fixed Term Contract and End Date	<input type="text"/>							
Home Address	<input type="text"/>										
	<input type="text"/>					<input type="text"/>			<input type="text"/>		
Postal Address (if different to above)	<input type="text"/>										
	<input type="text"/>					<input type="text"/>			<input type="text"/>		
Primary Email	<input type="text"/>		Secondary Email	<input type="text"/>							
Home Phone	<input type="text"/>		Mobile	<input type="text"/>							
Work Phone	<input type="text"/>										

Section B - Existing Customers

Name	<input type="text"/>
Payroll ID	<input type="text"/>
Start Date	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>
Department/ Site	<input type="text"/>
Work Location	<input type="text"/>

Checklist

For SalaryPackagingPLUS to set up your new package, we need:

- + Completed form
- + Recent payslip (or 5 payslips if you are casual)
- + Substantiation

Remote Area Property: Details

The street address of the remote area property that is the subject of this claim is:

<input type="text" value="street address"/>		
<input type="text" value="suburb"/>	<input type="text" value="state"/>	<input type="text" value="postcode"/>

Note: by completing and signing this salary packaging claim form (below) you confirm that the remote area property identified above has not been used for income generating purposes (e.g. agricultural production or short/long term letting) during the periods covered by the mortgage interest payments.

Claim Instructions

- Make sure you properly consider and complete all checklist items below as they are required to access the salary packaging tax benefits.
- Make sure you attach one of the following substantiation items below as your claim may not be accepted otherwise:
 1. A copy of your bank loan statement clearly identifying the interest amounts you are seeking to claim
 2. Payment receipts issued by your lender clearly identifying the interest amounts you are seeking to claim
 3. Bank account statement(s) showing the claimed interest amounts being debited against your available funds

Benefit Checklist

<input type="checkbox"/>	I would like to salary package \$ <input type="text"/> in mortgage interest expenses incurred by me and/or my spouse.
<input type="checkbox"/>	The loan was used exclusively to purchase and/or extend a remote area home;
<input type="checkbox"/>	I currently live in the remote area home as my usual place of residence and have lived there for the entire period covered by the mortgage interest amounts;
<input type="checkbox"/>	I have worked for my current employer in a remote area throughout the entire period covered by the mortgage interest amounts;
<input type="checkbox"/>	I have not drawn down on the loan (i.e. redrawn any amount) for any purpose at any time prior to (or during) the period covered by the mortgage interest amounts.
<input type="checkbox"/>	The loan is not a 'line of credit; style loan that allows regular deposits and withdrawals.
<input type="checkbox"/>	I have attached evidence showing the mortgage interest amounts paid.

Bank Account Details

Please pay the remote area salary packaging amounts into the following bank account:

Account Name		Financial Institution
BSB Number	Account Number	Transaction Reference Number

Employee Declaration

I declare that

- I am an employee of the above stated employer and have been employed there since
- The information provided in the above claim in relation to my remote area property and personal circumstances is true and correct
- I have not previously claimed these same expenses through salary packaging elsewhere
- The property that is the subject of this claim is a residential home that has not been used for income producing purposes at any time during the periods covered by the mortgage interest payments in this claim.
- I have read, and I agree to the terms and conditions of salary packaging as set by my employer and SalaryPackagingPLUS
- I authorise my employer and SalaryPackagingPLUS to arrange payroll deductions from my salary entitlement in order to enable payment of my chosen salary packaging benefit(s), including the benefits outlined in this form, and any SalaryPackagingPLUS administration fee.
- I understand that I am liable for any Fringe Benefits Tax that may be incurred due to incorrect information provided by me to SalaryPackagingPLUS in this document or at any other time.
- **I will inform SalaryPackagingPLUS immediately upon vacating the remote area home that is the subject of this claim and/or upon relocating my primary place of employment to another locality.**
- The expenditure amounts I am claiming under this salary packaging form were incurred by me and/or my legal spouse.

I have read and agree to the Privacy Policy which can be found at <http://salarypackagingplus.com.au/Privacy>

Signature

Date