



Australian Government



# Income and Assets

## Purpose of this form

This form asks you to provide information about your income and assets. This information is used to calculate your Centrelink payment.

## If you have a partner

You must tell us about your partner's income and assets.

You can complete this form for both you and your partner.

### OR

You may choose to complete an **Income and Assets** form (SA369) separately.

If you choose this option, tick this box

If you need more copies of this form you can go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au) or if you have any questions call Centrelink on the number shown in the booklet **Information you need to know about your claim**.

## For more information

Visit your local **Centrelink Customer Service Centre**, go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au) or call Centrelink on:

Disability, Sickness and Carers **13 2717**

Retirement **13 2300**

To speak to Centrelink in languages other than English, call **13 1202**.

**Note:** Calls from your home phone to Centrelink 13 numbers from anywhere in Australia are charged at a fixed rate. That rate may vary from the price of a local call and may also vary between telephone service providers. Calls from public and mobile phones may be timed and charged at a higher rate.

## What else you will need to provide

This form tells you which **other documents** you may need to provide to support your claim.

Depending on your circumstances you may have to fill in **other forms**.

## Filling in this form

Please use black or blue pen.

Mark boxes like this  with a ✓ or X.

Where you see a box like this  **Go to 5** skip to the question number shown.

You do not need to answer the questions in between.

## Returning your form(s)

Check that you have answered all the questions you need to answer, and that you (and your partner) have signed and dated this form.

If you return required documents (and your claim form):

- by post – we will photocopy your documents, and return originals to you by registered post.
- in person – we will photocopy your documents, and return the originals to you.

Return this form and all additional documents to a **Centrelink Customer Service Centre**.

1 Your name  
Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

2 Your date of birth

3 Your Customer Reference Number

4 Do you have a partner (married or de facto)?  
No  **Go to 8**  
Yes  **Go to next question**

5 Your partner's name  
Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

6 Your partner's date of birth

7 Your partner's Customer Reference Number

8 Do you (and/or your partner) CURRENTLY receive any income from work other than self employment?

No  **Go to 10**

Yes  Give details below



Attach payslip(s) for the last 8 weeks from each employer.

1 Employer's name

Address  
  
Postcode

Phone

Australian Business Number (ABN)

Who works for this employer You  Your partner

Is this work:  
Full-time  Part-time  Seasonal  Casual

Personnel, service or clock-card number

Hours worked per fortnight  per fortnight

GROSS amount earned per fortnight (before tax and other deductions) \$  per fortnight

Is this your usual wage? No  Yes

2 Employer's name

Address  
  
Postcode

Phone

Australian Business Number (ABN)

Who works for this employer You  Your partner

Is this work:  
Full-time  Part-time  Seasonal  Casual

Personnel, service or clock-card number

Hours worked per fortnight  per fortnight

GROSS amount earned per fortnight (before tax and other deductions) \$  per fortnight


Is this your usual wage? No  Yes

If you (and/or your partner) currently get income from more than 2 jobs, attach a separate sheet with details.

9 Do you (and/or your partner) get any fringe benefits provided by an employer (e.g. use of a car as part of a salary package, rent/mortgage paid)?

**Fringe benefits** – means a benefit received as part of earned income but not as a wage or salary.

No  Go to next question

Yes   Attach details that indicate the type of fringe benefit and its value, and whether or not the amount provided is 'grossed up' or not 'grossed up'.

10 Are you (and your partner) claiming Age Pension?

No  Go to next question

Yes  Go to 12

11 Please read this before answering the following question about seasonal, contract or intermittent work.


**Seasonal work** is work that is available for part or parts of the year at approximately the same time each year.

**Contract work** is any intermittent work that is performed under a contract for a specific function and/or period including sub-contract work.

**Intermittent work** is work that is available from time to time, can reasonably be predicted to end or not be available for a period, is less than a year in duration and does not accrue leave entitlements.

In the last 6 months, have you (and/or your partner) done any seasonal, contract or intermittent work?

No  Go to next question

Yes   You will need to complete and attach a **Seasonal, Contract and Intermittent Work Details** form (SU496). If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

12 Please read this before answering the following question about the market value of household contents and personal effects.

The **current market value** of an item is what you would get if you sold it. It is not the replacement or insured value.

**Include:**

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use and hobby collections (e.g. stamps, coins).

**Do NOT include:**

- fixtures such as stoves and built-in items.

What is your estimate of the current market value of your (and/or your partner's) household contents and personal effects?

Current market value	Amount owed
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

13 Do you (and/or your partner) have a life insurance policy that can be cashed in?

**Include:**


- policies with a surrender value (e.g. whole of life, paid up and endowment policies).

**Do NOT include:**

- friendly society bonds or life insurance bonds
- details of home, contents, car, mortgage or similar policies.

No  Go to next question

Yes  Give details below

 Attach the policy document and the latest statement for each policy.

1 Name of insurance company

Policy number	Surrender value
<input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

2 Name of insurance company

Policy number	Surrender value
<input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) have more than 2 insurance policies, attach a separate sheet with details.

**14** Do you (and/or your partner) own, partly own or have a financial interest in any motor vehicles, motor cycles or trailers?

No  Go to next question

Yes  Give details below

<b>1</b>	Type of asset (e.g. car)	Make (e.g. Ford)
	<input type="text"/>	<input type="text"/>
	Model (e.g. Focus)	Year
	<input type="text"/>	<input type="text"/>
	Current market value	Amount owed
	\$ <input type="text"/>	\$ <input type="text"/>
	Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b>	Type of asset (e.g. car)	Make (e.g. Holden)
	<input type="text"/>	<input type="text"/>
	Model (e.g. Astra)	Year
	<input type="text"/>	<input type="text"/>
	Current market value	Amount owed
	\$ <input type="text"/>	\$ <input type="text"/>
	Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) have more than 2 motor vehicles, motor cycles or trailers, attach a separate sheet with details.

**15** Do you (and/or your partner) own, partly own or have a financial interest in any boats or caravans/motor homes?

No  Go to next question

Yes  Give details below

<b>1</b>	Type of asset (e.g. boat)	Make (e.g. Quintrex)
	<input type="text"/>	<input type="text"/>
	Model (e.g. Coastrunner)	Year
	<input type="text"/>	<input type="text"/>
	Current market value	Amount owed
	\$ <input type="text"/>	\$ <input type="text"/>
	Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b>	Type of asset (e.g. caravan)	Make (e.g. Jayco)
	<input type="text"/>	<input type="text"/>
	Model (e.g. Heritage)	Year
	<input type="text"/>	<input type="text"/>
	Current market value	Amount owed
	\$ <input type="text"/>	\$ <input type="text"/>
	Your share <input type="text"/> %	Partner's share <input type="text"/> %


If you (and/or your partner) have more than 2 boats, caravans or motor homes, attach a separate sheet with details.

**16** Give details below of all accounts held by you (and/or your partner) in banks, building societies or credit unions.

**Include** savings accounts, cheque accounts, term deposits, joint accounts, accounts you hold in trust or under any other name, or money held in church or charitable development funds.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. Centrelink will convert this into Australian dollars.

**Do NOT include** shares or managed investments.

 Attach proof of all account balances (e.g. ATM slip, statements, passbooks).

**1** Name of bank, building society or credit union   
 Account number (this may not be your card number)   
 Type of account   
 Account balance \$   
 Currency if not \$AUD   
 Your share  % Partner's share  %

**2** Name of bank, building society or credit union   
 Account number (this may not be your card number)   
 Type of account   
 Account balance \$   
 Currency if not \$AUD   
 Your share  % Partner's share  %

**3** Name of bank, building society or credit union   
 Account number (this may not be your card number)   
 Type of account   
 Account balance \$   
 Currency if not \$AUD   
 Your share  % Partner's share  %

*Continued*

**4** Name of bank, building society or credit union   
 Account number (this may not be your card number)   
 Type of account   
 Account balance \$   
 Currency if not \$AUD   
 Your share  % Partner's share  %

**5** Name of bank, building society or credit union   
 Account number (this may not be your card number)   
 Type of account   
 Account balance \$   
 Currency if not \$AUD   
 Your share  % Partner's share  %

If you (and/or your partner) have more than 5 accounts, attach a separate sheet with details.

**17** Do you (and/or your partner) have any bonds or debentures?

Bonds refer to government and semi-government bonds.

**Include:**

- investments in and/or outside Australia

Bonds or debentures outside Australia should be included, with the current balance in the type of currency in which it is invested. Centrelink will convert this into Australian dollars.

**Do NOT include:**

- friendly society bonds, funeral bonds or life insurance bonds
- accommodation bonds for residing in an aged care facility.

No  Go to next question

Yes  Give details below

 Attach a document which gives details for each bond or debenture.

**1** Type of investment

Name of company

Current amount invested      Currency if not \$AUD

\$ <input type="text"/>	<input type="text"/>
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Your share <input type="text"/> %	Partner's share <input type="text"/> %
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**2** Type of investment

Name of company

Current amount invested      Currency if not \$AUD

\$ <input type="text"/>	<input type="text"/>
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Your share <input type="text"/> %	Partner's share <input type="text"/> %
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**3** Type of investment

Name of company

Current amount invested      Currency if not \$AUD

\$ <input type="text"/>	<input type="text"/>
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Your share <input type="text"/> %	Partner's share <input type="text"/> %
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If you (and/or your partner) have more than 3 bonds or debentures, attach a separate sheet with details.


**18** Do you (and/or your partner) have money on loan to another person or organisation?

**Include** all loans, whether they are made to family members, other people or organisations or trusts.

**Do NOT include** loans to get accommodation in a hostel.

No  Go to next question

Yes  Give details below

 Attach a document which gives details for each loan (if available).

**1** Who did you lend the money to?

Date lent	Amount lent
<input type="text"/> / <input type="text"/> / <input type="text"/>	\$ <input type="text"/>

Current balance of loan	Lent by you	Lent by your Partner
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

**2** Who did you lend the money to?

Date lent	Amount lent
<input type="text"/> / <input type="text"/> / <input type="text"/>	\$ <input type="text"/>

Current balance of loan	Lent by you	Lent by your Partner
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

**3** Who did you lend the money to?

Date lent	Amount lent
<input type="text"/> / <input type="text"/> / <input type="text"/>	\$ <input type="text"/>

Current balance of loan	Lent by you	Lent by your Partner
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you (and/or your partner) have more than 3 loans, attach a separate sheet with details.

**19** Do you (and/or your partner) own any shares, options, rights, convertible notes or other securities **LISTED** on the Australian stock exchange or a stock exchange outside Australia?

**Include** shares traded in exempt stock markets.  
**Do NOT include** managed investments.

No  Go to next question

Yes  Give details below

 Attach the latest statement for each share holding.

**1** Name of company

Number of shares or other securities ASX code (if known)

Country if not Australia Your share Partner's share  
  %  %

**2** Name of company

Number of shares or other securities ASX code (if known)

Country if not Australia Your share Partner's share  
  %  %

**3** Name of company

Number of shares or other securities ASX code (if known)

Country if not Australia Your share Partner's share  
  %  %


If you (and/or your partner) have more than 3 share holdings, attach a separate sheet with details.

**20** Do you (and/or your partner) own any shares, options or rights in PUBLIC companies, **NOT listed** on a stock exchange?

**Do NOT include** managed investments.

No  Go to next question

Yes  Give details below

 Attach the latest statement detailing your share holding for each company (if available).

**1** Name of company

Type of shares Number of shares

Current market value Your share Partner's share  
 \$   %  %

**2** Name of company

Type of shares Number of shares

Current market value Your share Partner's share  
 \$   %  %

**3** Name of company

Type of shares Number of shares

Current market value Your share Partner's share  
 \$   %  %

**4** Name of company

Type of shares Number of shares

Current market value Your share Partner's share  
 \$   %  %

If you (and/or your partner) have more than 4 share holdings, attach a separate sheet with details.

**21** Do you (and/or your partner) have any managed investments in and/or outside Australia?

**Include:**

- investment trusts
- personal investment plans
- life insurance bonds
- friendly society bonds.


**Do NOT include:**

- conventional life insurance policies
- funeral bonds, superannuation or rollover investments.

**APIR code** – is commonly used by fund managers to identify individual financial products.

No  Go to next question

Yes  Give details below

 Attach a document which gives details (e.g. certificate with number of units or account balance) for each investment.

**1** Name of company

Name of product (e.g. investment trust)      Type of product/option (e.g. balanced, growth)  
     

Number of units      APIR code (if known)  
     

Current market value      Currency if not \$AUD  
 \$     

Your share  %      Partner's share  %

**2** Name of company

Name of product (e.g. investment trust)      Type of product/option (e.g. balanced, growth)  
     

Number of units      APIR code (if known)  
     

Current market value      Currency if not \$AUD  
 \$     

Your share  %      Partner's share  %

If you (and/or your partner) have more than 2 managed investments, attach a separate sheet with details.

**22** Do you (and/or your partner) have any funeral bonds/ funeral investments?

No  Go to 24

Yes  Give details below

**1** Name of company

Name of product

APIR code      Purchase price incl. instalments but not interest  
     

Current value as per latest statement      Your share      Partner's share  
 \$       %       %

**2** Name of company

Name of product


APIR code      Purchase price incl. instalments but not interest  
     

Current value as per latest statement      Your share      Partner's share  
 \$       %       %

If you (and/or your partner) have more than 2 funeral bonds/funeral investments, attach a separate sheet with details.

**23** Have you (and/or your partner) a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No  Go to next question

Yes   Attach a copy of each contract.

**24 Please read this before answering the question below.**

**YOU** should answer this question **ONLY** if you are over Age Pension age or claiming Age Pension.

**YOUR PARTNER** should answer this question **ONLY** if they are over Age Pension age or claiming Age Pension.

For men the Age Pension age is 65 years.

For women the qualifying age for Age Pension is gradually being increased to 65. The table below will help you work it out.

Woman's date of birth	Age Pension age
On or before: 30 June 1944	63
On or between: 1 July 1944 and 31 December 1945	63 1/2
1 January 1946 and 30 June 1947	64
1 July 1947 and 31 December 1948	64 1/2
On or after: 1 January 1949	65

Do you (or your partner) have any money invested in superannuation where the fund is still in accumulation phase and not paying a pension?

**Include:**

- approved deposit funds
- deferred annuities
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

No  Go to next question

Yes  Give details below

 Attach the latest statement for each superannuation investment.

**1** Name of institution/fund manager

Name of fund

Date of joining/investment    Current market value  
     \$

Owned by    You     Your partner

**2** Name of institution/fund manager

Name of fund

Date of joining/investment    Current market value  
     \$

Owned by    You     Your partner

*Continued*

**3** Name of institution/fund manager

Name of fund

Date of joining/investment    Current market value  
     \$

Owned by    You     Your partner

If you (and/or your partner) have more than 3 superannuation investments, attach a separate sheet with details.

**25 Please read this before answering the following question about regular payments from any income stream.**

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF)
- an employer subject to Australian prudential regulations.


**Types of income streams include:**

- Allocated Pension/Annuity
- Immediate Annuity
- Superannuation Pension (non-defined benefit)
- Defined Benefit Superannuation Pension (e.g. ComSuper pension, State Super pension)
- Market-Linked Pension/Annuity.

Do you (and/or your partner) receive income from any income stream products?

No  Go to next question

Yes  Give details below

 You will need to complete and attach a Centrelink schedule, **Details of income stream product** form (SA330) or a similar schedule (from your product provider), for each income stream product other than defined benefit superannuation pension. Attach a letter from your provider, for defined benefit superannuation, which details product reference number, commencement date, gross income amount, frequency of payments and undeducted purchase price.

**1** Name of product provider/SMSF/SAF

Type of income stream

Product reference number	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

**2** Name of product provider/SMSF/SAF

Type of income stream

Product reference number	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you (and/or your partner) have more than 2 income stream products, attach a separate sheet with details.

**26 Do you (and/or your partner) have any money invested in, or do you receive income from, any other investments not declared elsewhere on this form?**

**Include:**

- all investments from outside Australia (including superannuation) not declared elsewhere on this form.

**Do NOT include:**

- income from real estate in or outside Australia, private trusts, private companies or business
- social security payments.

No  Go to next question

Yes  Give details below

 Attach a document which gives details for each investment.

**1** Type of investment

Name of organisation/company

Current value of investment	Income received in last 12 months
<input type="text"/>	<input type="text"/>

Currency if not \$AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

**2** Type of investment

Name of organisation/company

Current value of investment	Income received in last 12 months
<input type="text"/>	<input type="text"/>


Currency if not \$AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you (and/or your partner) have more than 2 investments, attach a separate sheet with details.

**27** Do you (and/or your partner) receive payments from an Australian government department other than Centrelink (e.g. Department of Veterans' Affairs payment, New Enterprise Incentive Scheme (NEIS), Community Development Employment Projects (CDEP))?

No  Go to next question

Yes  Give details below

 Attach a letter or other document which gives the reference number and details of the payment (other than payments made by Centrelink) for each payment.

**1** Type of payment

Who pays it?

Reference number (if known)      Date commenced (if known)  
       /  /

Paid to: You  Your partner

**2** Type of payment

Who pays it?

Reference number (if known)      Date commenced (if known)  
       /  /

Paid to: You  Your partner

If you (and/or your partner) receive more than 2 payments, attach a separate sheet with details.


**28** Do you (and/or your partner) receive payments from an authority or agency outside Australia?

**Include** pensions from other countries, benefits, allowances, superannuation, compensation and war related payments.

**Note:** You must include details of pensions, allowances and other payments even if they are not taxable in the country of payment.

No  Go to next question

Yes  Give details below

 Attach a document from the issuing authority or agency which gives details including the amount in the foreign currency (e.g. latest pension certificate) for each payment.

**1** Type of payment

Country which pays it?

Authority or agency which pays it?

Date commenced (if known)      Paid to:  
 /  /       You  Your partner

**2** Type of payment

Country which pays it?

Authority or agency which pays it?

Date commenced (if known)      Paid to:  
 /  /       You  Your partner

If you (and/or your partner) receive more than 2 payments from an authority or agency outside Australia, attach a separate sheet with details.

**29** Do you (and/or your partner) receive money from any boarders or lodgers living with you?

**Include** boarders or lodgers who live with you or in accommodation at the property you live in (e.g. granny flat).  
**Do NOT include** immediate family members (son, daughter, parent).

No  Go to next question

Yes  Give details below

**1** Name of person

Relationship to you  Number of meals you provide each day

Amount paid per fortnight \$  Date started paying  /  /

Your share  % Partner's share  %

**2** Name of person

Relationship to you  Number of meals you provide each day

Amount paid per fortnight \$  Date started paying  /  /

Your share  % Partner's share  %

If you (and/or your partner) receive money from more than 2 people living with you, attach a separate sheet with details.

**30** In the last 12 months, have you (or your partner) received a lump sum payment that you have not already advised on this form?

**Do NOT include** compensation, insurance or damages lump sum payments.

No  Go to next question

Yes  Give details below

Type of lump sum

Who paid it?

Amount paid \$  Date paid  /  /

Who received this lump sum payment? You  Your partner

If you (and/or your partner) have received more than 1 lump sum payment, attach a separate sheet with details.

**31** Do you (and/or your partner) receive any payments from other sources that you have not already advised us about on this form?

**Include:**

- gratuities
- match or sporting payments
- other income or payments from other countries
- payment in kind, such as non-monetary payments for services
- scholarships, educational assistance or allowance
- any other income.

No  Go to next question

Yes  Give details below



Attach the most recent statement/certificate that gives details for each type of payment.

**1** Type of payment

Who pays it?

Amount per fortnight \$  Your share  % Partner's share  %

**2** Type of payment

Who pays it?

Amount per fortnight \$  Your share  % Partner's share  %

If you (and/or your partner) receive more than 2 types of payments, attach a separate sheet with details.

**32** In the last 5 years have you (and/or your partner) given away, sold for less than their market value, or surrendered a right to, any cash, assets, property or income?

**Include** forgiven loans and shares in private companies.

No  Go to next question

Yes  Give details below

**1** What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold	What it was worth
/ /	\$

What you got for it	Your share	Partner's share
\$	%	%

Indicate if this gift was to a Special Disability Trust (SDT)

**2** What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold	What it was worth
/ /	\$

What you got for it	Your share	Partner's share
\$	%	%

Indicate if this gift was to a Special Disability Trust (SDT)

If you (and/or your partner) have given away/sold more than 2 gifts, attach a separate sheet with details.

**33** In the last 12 months have you (and/or your partner) borrowed an amount which is secured against your home?

**Include:**

- Home Equity Conversion Loan
- Reverse Equity Mortgage.

**Do NOT include:**

- a mortgage taken out to purchase your home.

No  Go to next question

Yes  Give details below

 Attach a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

Address

Postcode

Entered into by: You  Your partner

If you (and/or your partner) have more than 1 loan, attach a separate sheet with details.

**34** Do you (and/or your partner) have any other assets (in or outside Australia) that you have not already advised us about on this form?

**Include** taxi plates, time share, racehorses, greyhounds, investment collections (stamp, coin, wine, art, antiques), travellers cheques, etc.

No  Go to next question

Yes  Give details below

**1** Description of asset

Current market value	Amount owed

Currency if not \$AUD	Your share	Partner's share
	%	%

**2** Description of asset

Current market value	Amount owed

Currency if not \$AUD	Your share	Partner's share
	%	%

If you (and/or your partner) have more than 2 other assets, attach a separate sheet with details.

**35 Please read this before answering the following question about private trusts.**

You (and/or your partner) may be, or have been:

- a trustee
- an appointor
- a beneficiary

**OR** have

- made a loan to a private trust
- made a gift of cash, assets, or private property to a private trust in the last 5 years
- relinquished control of a private trust in the last 5 years
- a private annuity
- a life interest
- an interest in a deceased estate.

A private trust includes a non-complying Self Managed Superannuation Fund or a non-complying Small APRA Fund.

Are you or have you (and/or your partner) been involved in a private trust?

No  **Go to 37**

Yes  **Go to next question**

**36 Is the private trust a Special Disability Trust (SDT)?**

No

 You will need to complete and attach a **Private Trust** form (**Mod PT**). If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

Yes

 You will need to complete and attach a **Special Disability Trust** form (**Mod SDT**) if this has not already been done. If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

**37 Please read this before answering the following question about private companies.**

You (or your partner) may be, or have been:

- a director
- a shareholder

**OR** have:

- made a loan to a private company
- transferred shares in a private company in the last 5 years
- made a gift of cash, assets or property to a private company in the last 5 years.

Are you or have you (and/or your partner) been involved in a private company?

No  **Go to next question**

Yes

 You will need to complete and attach a **Private Company** form (**Mod PC**). If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

**38 Are you (and/or your partner) involved in any type of business?**

**Include:**

- farming
- self-employed
- sole trader
- partnership
- sub-contractor.

No  **Go to next question**

Yes

 You will need to complete and attach a **Business details** form (**Mod F**). If the business owns real estate you will also need to complete and attach a **Real estate details** form (**Mod R**) for each property. If you don't have these forms, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

**39 Do you (and/or your partner) own, or are buying, or have a life interest in your home?**

No  **Go to 43**

Yes  **Go to next question**

**40 Is the home on a block of land larger than 2 hectares (5 acres)?**

No  **Go to next question**


Yes

 You will need to complete and attach a **Real estate details** form (**Mod R**). If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)  
**Go to 42**

**41 Is the home on more than one title document?**

No  **Go to next question**

Yes

 You will need to complete and attach a **Real estate details** form (**Mod R**). If you don't have this form, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

**42 Is any part of the home property used for income producing purposes?**

**Do NOT include** rent from boarders or lodgers.

No  **Go to next question**

Yes

 You will need to complete and attach a **Business details** form (**Mod F**) and a **Real estate details** form (**Mod R**). If you don't have these forms, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)

**43** Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia?

No  **Go to 45**

Yes  **Go to next question**

**44** How many other properties in and/or outside Australia do you (and/or your partner) own or have an interest in?

 You will need to complete and attach a **Real estate details form (Mod R)** for each property. If you don't have these forms, contact Centrelink or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)


**45** Please read this before answering the following question about compensation, insurance and/or damages.

**Include:**

- workers' compensation/damages as a result of a work injury
- third party damages as a result of a motor vehicle accident
- personal accident and sickness insurance or income replacement insurance
- sporting injury compensation
- public liability compensation
- medical negligence compensation
- damages paid to victims of crime or as a result of criminal injuries.

Have you (or your partner) ever **CLAIMED** or are you (or your partner) **ABLE TO CLAIM** compensation, insurance and/or damages?

No  **Go to next question**

Yes   You will need to complete and attach a **Compensation and damages form (Mod C)**. If you don't have this form, contact Centrelink or go to our website [www.centrelink.gov.au](http://www.centrelink.gov.au)

**46** Are you (and/or your partner) **RECEIVING** or have you (and/or your partner) **EVER BEEN PAID** compensation, insurance and/or damages?

No  **Go to next question**

Yes   You will need to complete and attach a **Compensation and damages form (Mod C)**. If you don't have this form, contact Centrelink or go to our website [www.centrelink.gov.au](http://www.centrelink.gov.au)

**47** Who should we contact if we require more details about your answers on this **Income and Assets** form?

Myself

My partner  **Go to 49**

My nominee

My accountant/financial adviser or other person  **Go to next question**

**48** Please give contact details of the accountant/financial adviser/other person.

Full name

Address

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---

Postcode

Phone number

**Go to next page**

**49** Which of the following forms, documents and other attachments are you (and/or your partner) providing with this form?

*If you are not sure, check the question to see if you should attach the documents.*

Where you are asked to supply documents, please attach original documents.

- Attach payslip(s) for the last 8 weeks   
from each employer  
*(If you answered Yes at question 8)*
- Fringe Benefit details   
*(If you answered Yes at question 9)*
- Seasonal, Contract and Intermittent Work Details** form (SU496)   
*(If you answered Yes at question 11)*
- Insurance policy documents and latest statements   
*(If you answered Yes at question 13)*
- Documents showing balances for bank, building society and credit union accounts   
*(if required for question 16)*
- Investment bond/debenture documents   
*(If you answered Yes at question 17)*
- Money on loan documents (if available)   
*(If you answered Yes at question 18)*
- Share certificates or latest statement for each shareholding LISTED on a stock exchange   
*(If you answered Yes at question 19)*
- Share certificates or latest statement for each shareholding NOT Listed on a stock exchange   
*(If you answered Yes at question 20)*
- Managed investment certificates or similar documents   
*(If you answered Yes at question 21)*
- Funeral bond contract(s)   
*(If you answered Yes at question 23)*
- Latest statements for approved deposit funds, deferred annuities, rollover funds and superannuation funds, tax returns and member's statements for SMSF and SAF funds, and latest council rates notices for real estate held by those funds   
*(If you answered Yes at question 24)*
- Latest schedules and/or letters for income stream products or **Details of income stream product** form (SA330)   
*(If you answered Yes at question 25)*
- Documents with details of investments   
*(If you answered Yes at question 26)*
- Letters/documents with details of other Australian government payments   
*(If you answered Yes at question 27)*
- Documents with details of payments by authorities or agencies outside Australia   
*(If you answered Yes at question 28)*
- Most recent statements/certificates with details of other payments   
*(If you answered Yes at question 30)*

*Continued*

Copy of the loan agreement or contract   
*(If you answered Yes at question 33)*

**Private Trust** form (Mod PT) OR   
**Special Disability Trust** form (Mod SDT)   
*(If you answered Yes at question 36)*

**Private Company** form (Mod PC)   
*(If you answered Yes at question 37)*

**Business details** form (Mod F) and a   
**Real estate details** form (Mod R)   
*(If you answered Yes at question 38)*

**Real estate details** form (Mod R) for your home   
*(If you answered Yes at question 40)*

**Real estate details** form (Mod R) for your home   
*(If you answered Yes at question 41)*

**Business details** form (Mod F) and a   
**Real estate details** form (Mod R)   
*(If you answered Yes at question 42)*

**Real estate details** form (Mod R) for each property   
*(See question 44)*

**Compensation and damages** form (Mod C)   
*(If you answered Yes at questions 45 or 46)*

## 50 Statement

### I declare that:

- the information I have given on this form is complete and correct.
- I have received the **Information Booklet** which includes the privacy notice.

### I understand that:

- giving false or misleading information is a serious offence.
- Centrelink can make any enquiries necessary to ensure that I receive the correct entitlements.


Your signature



Date

/ /

Your partner's signature



Date

/ /