

Salary Packaging Application Form



Your Details

Title	First Name	Last Name	Employer Name
Position	Mobile Number	Date of Birth	
Payroll ID	Employment Status (Full time, Part time, Casual)	Email Address (work)	Email Address (personal)
Address	Suburb	State	Postcode

Additional Details

I have a higher education loan

I currently receive Government benefits

I am provided a company car

I claim the Tax-free threshold through this employer

Reportable Expenses

How much?

Please package the maximum amount I can

Each pay I receive \$

I want to package a set amount per pay

Please deduct the following amount

I want to package 100% of my pay

\$. per

My preferred way to package

Salary Packaging Card

Please arrange a Salary Packaging Card for me

You will soon receive an email from us with a link to complete the set up of your Beyond Bank Salary Packaging Card.



OR

By reimbursement

Use the following section to detail what items you would like to salary package and attach the required evidence of these items. (Further information is in A Guide to Salary Packaging - Reportable Fringe Benefits or you can contact us directly)

Required Evidence

- ✓ **Mortgage:** Clear copy of recent* loan statement showing your name, minimum payment amount, balance and frequency on the one document.
- ✓ **Home rental:** Clear copy of your current rental agreement or a signed statutory declaration.

- ✓ **Credit Card:** Clear copy of recent* statement(s) showing your name, card limit and repayments you have made.

- ✓ **Personal Loan:** Clear copy of the loan documents and repayment schedule.

All other expenses are claimed using the Salary Packaging Card
* Not more than 6 months old

Packaging Item	Amount per cycle	Evidence Attached
	\$	
	\$	
	\$	
	\$	

Payment Instructions

Account Name

BSB or Biller Code

Reference

Account Number

Bank Statement Attached



To comply with regulations relating to the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, you must supply a recent clear copy of a statement for the account that you are nominating for the payment of your reimbursement. The statement must show your name, the institution name and the account/payment details on the one document. Recent means within the last 6 months.

Meal Entertainment and Entertainment Facility Leasing

How much?

Please package the maximum amount I can

I want to package a set amount per pay

Please deduct the following amount

\$. per

My preferred way to package

Salary Packaging Card

Please arrange a Salary Packaging Card for me

You will soon receive an email from us with a link to complete the set up of your Beyond Bank Meal Entertainment Card.



OR

By reimbursement

By choosing to structure your Meal Entertainment benefit by reimbursement, you will need to collect compliant invoices and proof of payment until you have a total of at least \$200.00. When you have done this, you can submit a claim to us by completing the claims process, as per this link to our website.

(Further information is in A Guide to Salary Packaging - Meal Entertainment & Entertainment Facility Leasing)

The Declaration

By submitting this form

- I declare that I have read the 'Guide to Salary Packaging' for each nominated expense.
- I confirm that I have read my Employer's Salary Packaging Policy and I am eligible to participate in my employer's salary packaging program.
- I confirm that I have read and understand all the Terms and Conditions for Salary Packaging issued by my employer and/or The Salary Packaging People (TSPP).
- I authorise my employer to deduct the nominated amounts and applicable fees from my salary and to alter any future deductions as required.
- I understand that payment for the nominated expense by TSPP can only occur if my salary has been deducted for these expenses. If there are insufficient funds received by TSPP, TSPP will only pay the amount received less any relevant fees and charges.
- I acknowledge that it is solely my responsibility to obtain my own financial advice independent of TSPP and my employer.
- I confirm that all the details provided in this application (including the supplied evidence) are true and correct and I understand that by supplying false or misleading information I am directly responsible for any payment of penalties and/or costs incurred by my employer and/or TSPP.
- I agree that I will immediately supply any updated information or evidence as requested by TSPP and/or my employer. I further agree that if I do not supply the requested information or evidence, my participation in the salary packaging program may be suspended or cancelled.
- I acknowledge that by participating in my employer's salary packaging program, I may have a Reportable Fringe Benefit Amount on my annual Income Statement or Payment Summary.
- I confirm that the nominated benefits for reimbursement will not be claimed through any other salary packaging arrangement or through a tax deduction.
- I acknowledge that it is solely my responsibility to determine whether participating in salary packaging will have an impact on any government payments I receive or am required to make including, but not limited to, Study and Support Loans (HECS/HELP).
- I confirm that I have read and agree to the TSPP Privacy Policy which is available on request or via this link to our website. <https://www.salarypackagingpeople.com.au/privacy-policy>
- I confirm that the notation of my name in the following 'Signature' section is an electronic representation of my signature for all purposes required in this form, just the same as my normal pen-and-paper signature.

By ticking this box I agree that this signature is acceptable in its digital form

Date

Signature