

## Refund of Franking Credits Application

### APPLICANT INFORMATION

Full Name:

Date of birth:

Phone:

Email:

Address:

Suburb/City:

State:

Post Code:

### BANK ACCOUNT DETAILS

*This is the bank account where you want the refund of your franked dividends to be paid*

Account Name:

BSB:

Account Number

### SPOUSE INFORMATION

Full Name:

### MANAGED FUND

Do you have investments in a managed fund (Yes/No)?

If you have answered **Yes**, please include the annual tax statement you have received from the fund, for the relevant years, if you have it.

### FINANCIAL YEARS YOU WISH TO CLAIM (tick all applicable)

- |   |   |   |   |
|---|---|---|---|
| <input type="checkbox"/> <b>2006-2007</b> | <input type="checkbox"/> <b>2007-2008</b> | <input type="checkbox"/> <b>2008-2009</b> | <input type="checkbox"/> <b>2009-2010</b> |
| <input type="checkbox"/> <b>2010-2011</b> | <input type="checkbox"/> <b>2011-2012</b> | <input type="checkbox"/> <b>2012-2013</b> | <input type="checkbox"/> <b>2013-2014</b> |
| <input type="checkbox"/> <b>2014-2015</b> | <input type="checkbox"/> <b>2015-2016</b> | <input type="checkbox"/> <b>2016-2017</b> |   |

*If you want to claim back franking credits for any years before 2006-2007 you will need to have the dividend statements and include them with this form.*

### DECLARATION

I declare that all the information provided above is true and correct in every detail. I authorise BAN TACS Accountants Pty Ltd to apply for a refund of my franking credits on my behalf and to act as my tax agent. I declare that my taxable income is below the taxable threshold for the relevant year. I confirm that I am a resident of Australia for tax purposes. Further, I declare that I have not lodged a tax return for the relevant year. I understand that there may be extra charges if I want to claim franking credits for shares in companies that have not reported my dividend to the ATO but I will be contacted before further costs are incurred.

### SIGNATURE

**Please sign below and send your completed application together with a cheque for \$80 per year claimed to:**

**BAN TACS Accountants PO Box 82, Mackay, QLD 4740**

**Signature of applicant:**

**Date:**