



Copies of returns request – individuals and authorised representatives

Individuals or their authorised representatives can use this form to request copies of notices of assessment, lodged tax returns and group certificates or payment summaries.

HOW TO MAKE A REQUEST?

You can use this form. A covering letter is not required. We will make all efforts to provide you with the response within 28 days.

SIGNATURE REQUIREMENTS

The request must be signed by the taxpayer or their authorised representative. Refer to section C on page 2 or section D on page 3.

COSTS

An administrative fee of \$10 per tax return applies for original paper returns.

No fee applies where requests are satisfied by the provision of a copy of the electronic record.

Send your completed form with payment (if required) to us at the address listed on page 3.

PAYMENT

Payment can be made by cheque or money order.

Cheques and money orders should be for amounts in Australian dollars and payable to 'Deputy Commissioner of Taxation'. Cheques should not be crossed 'Not Negotiable' and must not be post dated.

Do not use pins, staples, paper clips or adhesive tape. Do not send cash.

REMISSION OR WAIVER OF FEES AND CHARGES

You can ask for fees to be waived for any reason, including financial hardship or public interest. If you request the usual fee to be reduced or waived in full, you must provide evidence to support this request.

Section A: Applicant's details

Tax file number (TFN)

Name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Date of birth Day / Month / Year

Postal address

Suburb/town

State/territory

Postcode

Phone number

Mobile number

Country (if not Australia)

Section B: Copies of tax documents

! Select only one option.

Copies of electronic returns

Copies of paper returns (original)

! Copies of paper returns are available for the last four years from the date the notice of assessment is issued. There is an administration fee of \$10 for each year requested (paper returns only).

Tax return Income year 1 July Year to 30 June Year

Notice of assessment Income year 1 July Year to 30 June Year

Group certificate or payment summaries Income year 1 July Year to 30 June Year

Additional information

Section C: Declaration

- !** If you are:
- requesting your own tax documents, you must complete question 1
 - a public trustee, tax agent or executor, you must complete question 2
 - a legal representative (for example, a lawyer), you do not need to complete this section. You must complete section D on page 3.

1 INDIVIDUAL

Name (print)

Signature

Date

Day Month Year

□□ / □□ / □□□□

2 PUBLIC TRUSTEE, TAX AGENT OR EXECUTOR

Name (print)

Tax agent registration number (if applicable)

Phone number

Fax number

Signature

Date

Day Month Year

□□ / □□ / □□□□

- !** If you are:
- a public trustee, you must provide a certificate of authority
 - an executor, you must provide copies of the will, death certificate, probate or letter of administration
 - a tax agent, you must provide a *Notice of appointment of legal practitioner as agent on behalf of an entity* form (NAT 15898). If you have already registered your client with us, you do not need to provide this form.

Section D: Authority for legal representative to obtain taxpayers records

I hereby authorise

of

whose signature appears below, to obtain access to the documents described above.

Client's name

Client's signature

Date

Day

Month

Year

 / /

Representative's name

Phone number

Fax number

Representative's signature

Date

Day

Month

Year

 / /

This authority is valid:

from / / to / /

Section E: Checklist

Ensure that you have a written authorisation to act on behalf of the individual.

Have you attached any documentation that may be required for proof of identity (POI)?

Accepted POI documents include:

- Litigation Guardian administration order
- enduring Power of Attorney
- a copy of a will or probate or letters of administration.

MORE INFORMATION

If you need more information about completing this form, call us on **13 28 61**.

How to lodge your form

 Complete this form electronically, then print and sign the form before sending it to us.

You do not need to include a cover letter with this form.

Send the completed form and payment (if required) to us by mail to:

Australian Taxation Office
PO Box 3006
PENRITH NSW 2740

If payment is not required, you can send the completed form to us by fax on **1300 730 298**.