

# WEALTHFOCUS PENSION PLAN TAX GUIDE

July 2015

## TO HELP YOU COMPLETE YOUR TAX RETURN FOR THE 2014/2015 FINANCIAL YEAR

### HOW TO USE THIS GUIDE

This guide is designed to help you if you are required to complete the 2015 Tax Return for Individuals.

If you are unsure whether you are required to complete a return, please refer to pages 5-6 of the Individual tax return instructions 2015 ('2015 instruction booklet'). This publication is available from the Australian Taxation Office (ATO) – download it from the ATO website or call 1300 720 092. The 2015 instruction booklet will refer you to additional information for each item which is available on the ATO website – [www.ato.gov.au/instructions2015](http://www.ato.gov.au/instructions2015).

Our guide provides step-by-step instructions on where you need to include information about your investment in Perpetual WealthFocus Pension Plan (Plan) in your tax return.

You will need to refer to the Plan PAYG Payment Summary – superannuation income stream. You do not need to include this with your tax return but you should keep it with your records.

If you have any questions about your Plan PAYG Payment Summary, please email [investments@perpetual.com.au](mailto:investments@perpetual.com.au) or phone **1800 022 033** during business hours (Sydney time).

### OBTAIN YOUR OWN TAX ADVICE

The information provided in this guide is not tax advice and only relates to your investment in the Plan. The steps provided are not a complete guide to completing your tax return.

We recommend you seek professional assistance when completing your tax return and refer any questions about your tax return to your tax adviser or the ATO. We are not able to provide you with tax advice.

### HOW TO COMPLETE THE 2015 TAX RETURN FOR INDIVIDUALS

The 2015 Tax Return for Individuals is included in the 2015 instruction booklet. There are two questions that you need to complete in relation to your investment in the Plan. The following information explains how to complete these questions.

You should use the 2015 instruction booklet in addition to our guidelines.

### Question 7 – Australian annuities and superannuation income streams

**Step 1.** See pages 15-16 of the 2015 instruction booklet for the ATO's instructions.

**Step 2.** In the boxes above and to the left of J, write the amount of the 'Total tax withheld' as shown on your Plan PAYG Payment Summary (whole dollars only).

**Step 3.** At J write the 'Taxable component – Taxed element' as shown on your Plan PAYG Payment Summary (whole dollars only).

### To complete question T2 – Australian superannuation income stream

**Step 1.** See page 41 of the 2015 instruction booklet for the ATO's instructions.

**Step 2.** At S write the 'Tax offset amount' as shown on your Plan PAYG Payment Summary (whole dollars only).

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### MORE INFORMATION

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