WHAT IS TAX HELP? Tax Help is free and confidential service which assists low income earners to complete their tax returns via E-Tax. Tax help volunteers are not Australian Tax Office staff, but they do receive training and support from the Australian Taxation Office (ATO).

TAX HELP VOLUNTEERS ARE NOT PERMITTED TO ASSIST IF:-

- you were in business, including being a sole trader (this means you have an ABN)
- you were employed as a contractor (for example a contract cleaner or taxi driver)
- you sold shares
- you sold an investment property
- you owned a rental property
- you received royalties
- you received distributions from a trust other than a managed fund
- You received foreign income other than a foreign pension or annuity.

If any of the above applies, you will need to make other arrangements to get assistance with your Tax Return, as the ATO have strict guidelines which all Tax Help volunteers must adhere to.

IF NONE OF THE ABOVE APPLIES TO YOU

The following table will help you determine if you are eligible for Tax Help:-

<table>
<thead>
<tr>
<th>If you are...</th>
<th>And your taxable income is...</th>
</tr>
</thead>
<tbody>
<tr>
<td>A single person</td>
<td>$50,000 or less.</td>
</tr>
<tr>
<td>Married or de facto</td>
<td>$50,000 or less plus $2,500 for each child.</td>
</tr>
<tr>
<td>A single parent</td>
<td>$50,000 or less plus $2,500 for each child.</td>
</tr>
</tbody>
</table>

WHERE IS TAX HELP AVAILABLE?

The University of Melbourne - Parkville campus operates during second semester. In 2012 the program will be available July 23 – October 26, with weekday appointments according to volunteer availability.

If you would prefer an appointment outside of business hours and/or you are not a currently enrolled University of Melbourne Student, please call 13 28 61. Tax Help is available in all capital cities and many country centres across Australia, with volunteers operating from convenient locations in the community.

ABOUT TAX HELP VOLUNTEERS

- They are not Australian Taxation Office staff, nor are they Tax Agents or Accountants.
- Are only permitted to provide help with areas of tax that they have been trained in. If you have income deductions or tax offsets that fall outside of this scope of Tax Help, they will suggest you contact the Australian Taxation Office.
- In some cases, people on low incomes do not need to lodge tax returns. Tax Help volunteers can work out if a tax return is necessary in your case. If it is not necessary, and you lodged a tax return last year, it is important that the Tax Office knows this.
- Can help you to fill out a Non-Lodgement Advice if this is necessary.
- Can assist you with claims for family tax benefit, refund of imputation credits and baby bonus.
- Are not permitted to assist with: business tax returns; partnership and trust matters; capital gains tax (CGT); and/or rental property.
• Cannot assist you with amendments or queries relating to your assessment. You will need to contact the Australian Taxation Office directly.

WHAT TO BRING TO YOUR APPOINTMENT?
If you had a spouse or partner you will need to bring along their information also.

MUST BRING:-
- Your tax file number
- Your Medicare card or number
- Your BSB and bank account details.

IF APPLICABLE, YOU MUST ALSO BRING WITH YOU:-
- An original or amended Notice of Assessment (any one from the last 5 years).
- Your private health insurance statement showing your fund details. Please Note: If you are covered by your parent’s private health insurance, please ask them for a copy of their statement.
- All your (and your spouse’s) statements from banks and financial institutions showing interest you received during the financial year. Including any bank account keeping fees.
- All copies of your (and your spouse’s) PAYG payment summaries from employers.
- Details of last year’s education tax refund claim (if any).
- All your (and your spouse’s) statements from Centrelink and/or the Department of Veteran Affairs (DVA).
- All your (and spouse’s) payment summaries from superannuation funds (if any)
- All your (and your spouse’s) dividend, super and managed fund statements.
- All your (and your spouse’s) foreign income details and pension statements or details of the amount you received.
- All your (and your spouse’s) employer termination payment (ETP) summaries.
- All your (and your spouse’s) receipts for gifts, donations and work related expenses.
- You (and your spouse’s) details of any child care support payments.

IMPORTANT
- If you had a spouse (married, de facto or same sex) at anytime during the financial year, you will need to bring details of their taxable income to your appointment. Without this information we are unable to complete your tax return.
- Please ensure that you are organized for your appointment as our Tax Help volunteers will not be able to sort through documents & records for you.
- We are only able to complete one year’s tax return during a one hour appointment. If you have past tax returns to lodge, you will require further appointments.

BOOKING AN APPOINTMENT
- Have you determined that you are eligible for the Tax Help? (see page 1)
- Do you have ALL required documents? (see above “what to bring to your appointment”)
- If you answered YES to both questions – please book an appointment for Tax Help.
- One (1) hour appointments are allocated for one return. If you need assistance with more than one tax year/return, please book further appointments for each tax return.

Student Financial Aid  T: (03) 8344 6550
- If you are not a current student of the University of Melbourne but still eligible for Tax Help you should telephone 13 28 61 to find out where your nearest Tax Help office is.