



Copies of tax documents request

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.

Account owners of a non-individual entity (for example, company, superannuation fund, trust, partnership) and/or their authorised representatives can use this form to request copies of lodged tax returns and notices of assessment.

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 (INDIVIDUALS)

The request must be signed by the taxpayer or their authorised representative. Refer to section C on page 3 or section E on page 5.

SIGNATURE REQUIREMENTS (NON-INDIVIDUALS)

The request must be signed by the account owner or their authorised representative. Refer to section D on page 4 or section E on page 5.

! Make sure you have answered all the relevant questions correctly. An incomplete form may delay processing and we may ask you to complete a new form.

Section A: Applicant's details

Tax file number (TFN) or Australian business number (ABN)

TFN OR ABN

! We are authorised by the *Taxation Administration Act 1953* to ask for tax file numbers. You are not required by law to provide us with any TFN we have requested, however, failure to provide us with a TFN may result in a delay in processing this form. If we cannot identify a person from the information you provide, we may contact you for more information.

Name and date of birth of individual or name of non-individual entity

Name of individual

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Date of birth / /

OR

Name of non-individual entity (company, trust, partnership or superannuation fund)

Home/Business address

Suburb/town

State/territory
(Australia only)

Postcode
(Australia only)

Country if other than Australia

Phone number

Mobile number

Is your postal address (for mailing the documents to) different from your home/business address?

No Yes Provide details below

Suburb/town

State/territory

(Australia only)

Postcode

(Australia only)

Country if other than Australia

Section B: Copies of tax documents

Indicate what documents you require copies of below

For example, if you are requesting copies for 2011 and 2012 (two years), answer the question as '2011 to 2012'. If you are only requesting copies for 2012 (one year), answer the question as '2012', leaving the second field blank.

Tax returns Place in one box only. Print from the ATO's electronic record from ^{Year} to ^{Year}
Photocopy of the original lodged paper tax returns (may take longer to provide)

! We can only provide photocopies of tax returns which were lodged by paper.

Notices of assessment from ^{Year} to ^{Year}

! Companies and super funds – notices of assessment are not required for full self-assessment of company tax. The calculation statement located on the last page of the return is considered to be the notice of assessment, unless the return has been amended or it is a final return.

Trusts and partnerships – notices of assessment are not issued for non-taxable trust returns, unless the return has been amended or it is a final return.

Payment summaries (individuals only) from ^{Year} to ^{Year}

> For more information about payment summaries, visit our website at ato.gov.au and search for 'PAYG payment summaries – individual non-business'.

Additional information

Individuals or their authorised representatives proceed to section C.

Non-individual entities or their authorised representatives proceed to section D.

Section C: **Declaration** – individuals or their authorised representatives

PRIVACY

Taxation law authorises the ATO to collect information and disclose it to other government agencies. This includes personal information of the person authorised to sign the declaration. For information about your privacy go to ato.gov.au/privacy



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 E on page 5.

1 INDIVIDUAL

Name

Signature of applicant

Date

Day Month Year
□□ / □□ / □□□□

2 PUBLIC TRUSTEE, TAX AGENT OR EXECUTOR

Name

Tax agent registration number (if applicable)

Phone number

Fax number

Signature of authorised person

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

Proceed to section F.

Section D: **Declaration** – non-individual entities or their authorised representatives

PRIVACY

Taxation law authorises the ATO to collect information and disclose it to other government agencies. This includes personal information of the person authorised to sign the declaration. For information about your privacy go to ato.gov.au/privacy

! Before releasing any information, we must ensure that those requesting the information are authorised. The table below provides examples of who is authorised to sign the request.

Entity type	Account owner
Company or incorporated association	Public officer or directors
Unincorporated association or body of persons (for example, sporting club, social club or trade union)	Office holder The office holder for an unincorporated association or body of persons is a member of the committee of management. For example, someone who occupies the position of: <ul style="list-style-type: none"> ■ president ■ vice president ■ treasurer ■ secretary.
School (unless operating as a company)	Public officer A public officer must be appointed if the unincorporated association or body of persons is carrying on a business.
Partnership	Principal
Trust	Named partners only
Trust	Trustee for the trust If the trustee is a company, it is the public officer or director.
Superannuation entity	Trustee for the entity If the trustee is a company, it is the public officer or director.
Deceased estate	The executor or executrix must provide a death certificate and a copy of will or grant of probate. If there is no valid will, they must provide a copy of the death certificate and letters of administration as granted by a court.
Government agency or entity (except schools)	Chief executive officer or authorised contact

Account owners can authorise legal practitioner or the public trustee to deal with their taxation matters. Refer to section E on page 5.

AUTHORISED PERSON

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Relationship to the entity

Tax agent registration number (if applicable)

Business hours phone number

Fax number

Signature of authorised person

Date
Day / Month / Year
 / /

- !** If you are:
- a public trustee, you must provide a certificate of authority
 - an executor, you must provide copies of death certificate and a will. If there is no will, a copy of probate or letter of administration

Section E: Authority for legal representative to obtain taxpayer records

I hereby authorise

of

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

Name of entity (individual, company, superannuation fund, trust, partnership)

Position (for example, trustee or public officer) if applicable

Reference

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 F: Checklist

- Ensure that you have a written authorisation to act on behalf of the individual / non-individual entity.
- Have you attached any documentation that may be required, for example, a copy of the will, probate, letter of administration, death certificate, Litigation Guardian administration order, enduring Power of Attorney?

MORE INFORMATION

For more information about completing this form, phone:

- **13 28 61** (individuals)
- **13 28 66** (non-individuals).

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 to us either:

- by mail to
Australian Taxation Office
PO Box 3006
PENRITH NSW 2740
- by fax on **1300 730 298**.