

# Salary Packaging Application Form for Health sector employees



Please complete all sections

## Section 1: Your details

### Your personal details

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Last name: \_\_\_\_\_

Date of birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Gender: \_\_\_\_\_

Postal address: \_\_\_\_\_

Preferred email address: \_\_\_\_\_ Mobile phone number: \_\_\_\_\_

### Your employment details

Employer name: \_\_\_\_\_

Payroll ID Number: \_\_\_\_\_ Gross annual salary: \$ \_\_\_\_\_

Employment status:  Full time  Part time  Casual  Locum

Pay Cycle:  Fortnightly  Monthly Pay Cycle name (if known):  Nursing  Non-Nursing

In the current Fringe Benefits Tax year (1 April - 31 March) have you salary packaged at any other NSW Health organisation?  Yes  No

If yes, which organisation?: \_\_\_\_\_

## Section 2A. Living Expenses Card

Your annual cap limit runs from 1 April to 31 March every year. To salary package with a Living Expenses payment card, tick the below box and nominate the amount you would like to allocate to the card each fortnight within the \$9,010 limit each FBT year.

I would like to salary package with a Living Expenses Card  
I would like to allocate \$ \_\_\_\_\_ per fortnight.

**OR** Tick the below box if you wish to set your annual allocation amount and maximise your cap limit each FBT year.

I would like to maximise \$9,010 per FBT year. Maxxia will set up your deduction to maximise this benefit over your available pay cycles before 31 March.

## Section 2B. Regular Benefit Payments

Please confirm which regular benefit (e.g. mortgage, rent, personal loan) you would like to package. These types of benefits provide a regular reimbursement to you from each pay, all we require is your bank details. These options are within the \$9,010 limit each FBT year.

Benefit item	Fortnightly deduction amount	Account name	BSB number	Account number
E.g. Mortgage	\$346.54	J Smith	000 000	000 000 000

**You cannot salary package mortgage repayments that are linked to an interest offset facility account.**

## Section 3. Meal Entertainment

Under the Meal Entertainment benefit, you could salary package a range of meal-related expenses with family or friends. The Meal Entertainment benefit is subject to a combined single annual cap limit of \$2,650 each FBT year.

To include the following additional benefit, tick the box on the following page that you wish to add and nominate the amount you want to allocate to the benefit each fortnight within the \$2,650 limit for each FBT year.

**ALL EMPLOYEES MUST COMPLETE THE DECLARATION AT THE END OF THIS FORM.**

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## Section 3. Meal Entertainment (continued)

Additional benefits to the \$9,010 cap	Tick to add	Set your allocation amount per fortnight (\$ or %)	OR Tick to set your annual allocation amount
Meal Entertainment Card	<input type="checkbox"/>	\$	<input type="checkbox"/> Maximise \$2,650 per FBT year. Maxxia will set up your deduction to maximise this benefit over the available pay cycles before 31 March.
Meal Entertainment	<input type="checkbox"/>	\$	

## Section 4. Your fees

Maxxia charge annual administration fees. To view your fees, please refer to your Employer Hub.

## Section 5: Your declaration

- You accept all terms and conditions of your Employer's salary packaging program
- You will be ineligible to claim a taxation deduction for all salary packaging payments made in relation to otherwise deductible items
- You will meet any cost including an FBT liability that may arise from your salary packaging arrangements
- You will maintain all records for a period of five (5) years in relation to any payments made by Maxxia
- You will make these records available to Maxxia, your employer, or the Australian Taxation Office as and when required.
- By completing this form, I agree to Maxxia contacting me about its products, services and offerings. Maxxia will handle your information in accordance with its Privacy Policy.

### If you add or make changes to your mortgage arrangements:

- You can not salary package mortgage repayments that are linked to an interest offset facility account
- You hold the necessary substantiation for your mortgage, including a copy of the loan contract, and statements of the mortgage account evidencing the payment of the mortgage
- You retain and maintain all records in relation to any payments made by Maxxia in respect of your mortgage for a period of five (5) years
- You undertake to make these records available to Maxxia, your employer, or the Australian Taxation Office if requested
- You will immediately notify Maxxia of any change to the status of your mortgage account
- Where Maxxia is reimbursing you for your mortgage benefit, you acknowledge that you have made arrangements for your financial institution to direct debit this account for payment to your mortgage.

Employee Name (print): \_\_\_\_\_

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Section 6: Submitting your application

You can submit this completed application form via:

**Email:** info@maxxia.com.au

**Fax:** 1300 733 444

**Post:** Maxxia Pty Ltd, Locked Bag 18, Collins Street East, Melbourne VIC 8003

## What happens next?

Once your application has been received, we will set up your new account.

You can then expect an email from us outlining your salary packaging arrangements, as well as a Welcome email with all the information you need to get started.

### DISCLAIMER

Maxxia provides administration and referral services on behalf of employers. It does not provide any form of financial, taxation or financial product advice to employees on the relative merits of package programs or on any other basis. Some information on taxation matters may be provided to illustrate possible advantages, but is of a general nature only. You should seek your own independent professional advice on how packaging programs may impact your particular financial, taxation and welfare benefit circumstances. Maxxia may receive commissions or rebates in connection with some services it provides or arranges to be provided by third parties. By appointing and utilising Maxxia services, you consent to its receipt of such commissions and rebates. Tax laws regarding the treatment of salary benefits may change, which could adversely impact your financial, taxation or welfare benefit decisions.

### PRIVACY

Maxxia is committed to protecting the privacy and rights of its customers. Our Privacy Policy contains important information about how we collect, hold, use and disclose personal information. It explains what happens if we cannot collect your personal information, as well as how you can access and correct the personal information we hold about you, or make a complaint. If you do not wish to receive promotional material from us, or would like a copy of our Privacy Policy, please contact us on 1300 123 123. Our Privacy Policy is also available at maxxia.com.au

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