

# Self-Managed Application Form

## Novated Lease



Government of  
South Australia



Please complete all sections

### Section A: Personal Information

- The person that applies for the self-managed Novated Lease must complete this section.
- Maxxia takes the utmost care to ensure that all information provided by you in relation to your self-managed Novated Lease and your salary packaging arrangements remains private and confidential at all times.
- If you would like to authorise in writing other individuals (eg. Your Financial Advisor and/or Accountant) to obtain information directly from Maxxia on your behalf, you may include their details in this Form under 'Section B: Authority of Disclosure of Information'.

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

Surname: \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Gender: \_\_\_\_\_ Payroll Identification Number: \_\_\_\_\_

Payroll Cycle:  Fortnightly  Other eg Weekly or Monthly \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_ Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Your contact details: Work: \_\_\_\_\_ Mobile: \_\_\_\_\_ Home: \_\_\_\_\_

Preferred Email: \_\_\_\_\_

Nominated account for reimbursement: Bank \_\_\_\_\_ Branch \_\_\_\_\_

Account name \_\_\_\_\_

BSB number  -  Account number

Employer (Agency) Name: \_\_\_\_\_

Employer Site Address \_\_\_\_\_

\_\_\_\_\_ Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

### Section B: Authority of Disclosure of Information (If required)

#### Details of Authorised Person

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Organisation: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Authorised person contact details: Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

#### Employee Declaration

I authorise the person named above under 'Details of Authorised Person' to obtain any information from Maxxia with respect to my self-managed Novated Lease and/or salary packaging arrangements.

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

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

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### Section C: Motor Vehicle Details – Novated Lease

#### Self-Managed Motor Vehicle Lease

Please complete the following section. The information should be available on your lease documentation from your financier.

Motor Vehicle Details – Novated Lease			
Registration number:	Make:	Model:	Year:
Colour:	Cost of vehicle: \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"><input type="text"/></input>		
Opening odometer reading:	kms	Opening odometer date:	
Estimated number of kilometres: (kilometres travelled on an annual basis)	kms		
Name of Financier:			
Address of Financier:			
Amount Financed: \$	Residual %	Residual \$	
Financier Bank Details: BSB: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> Account Number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			
Lease Payment Amount: \$ (regular monthly payment)	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"><input type="text"/></input>	Lease Commencement Date:	Term:
Lease Expiry Date:			
Substantiation	Attach the following: <ul style="list-style-type: none"> <li>• Finance documentation, including the finance agreement, tax invoice and details of any additional items included in the finance amount</li> <li>• Full copy of the SA Government Deed of Novation, executed</li> <li>• A copy of the dealer's invoice where purchased through a dealership</li> <li>• A copy of your drivers licence</li> <li>• A copy of your most recent full payslip</li> <li>• A copy of your comprehensive insurance certificate of currency for the vehicle</li> </ul>		

Motor Vehicle Running Costs Budget - Novated Lease			
For guidance and an example of how to establish your running costs budget, refer to Page 9 of the South Australian Government's "Salary Sacrifice Novated Lease Guide - Explaining the self-managed novated lease process" <b>which is available here</b>			
Registration costs \$ (per annum)	Insurance \$ (per annum)	Maintenance & Servicing \$ (per annum)	Tyres \$ (per annum)
Club membership \$ (per annum)	Fuel costs \$ (per annum)	Fuel type <input type="checkbox"/> LPG <input type="checkbox"/> Diesel <input type="checkbox"/> Unleaded	
Comments	<ul style="list-style-type: none"> <li>• With your self-managed lease a BP fuel card will be available</li> <li>• If you purchase fuel not using the fuel card, you can submit a claim for reimbursement</li> <li>• Except fuel costs, other motor vehicle running costs cannot be charged to the fuel card</li> <li>• You may submit a claim for fuel (not on the card) or reimbursement of any other motor vehicle running costs providing a copy of the tax invoice and receipt</li> <li>• Claims for reimbursement can be made through Maxxia Online or the Maxxia App</li> <li>• Reimbursement will be subject to funds being available in your account</li> </ul>		

### Section D: Seeking Financial Advice

**Maxxia recommends that professional financial and taxation advice on your particular financial circumstances is obtained before entering into any Novated Leasing and/or salary packaging arrangement. Any fees paid for financial advice may be eligible to claim under your salary packaging arrangement.**

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### Section E: Employee Declaration

- I am responsible for sourcing my own novated lease finance and ensuring the vehicle is compliant under a novated lease. If you're unsure about eligible vehicles please refer to ([www.sagov.maxxia.com.au/selfmanaged](http://www.sagov.maxxia.com.au/selfmanaged))
- I am responsible for contacting Maxxia and submitting complete and compliant novated lease documentation required to set up my salary packaging account.
- I will be responsible for setting up and managing my own novated leasing budget.
- I am responsible for ensuring that my leased vehicle is comprehensively insured and registered throughout the life of the lease.
- I will be responsible for any advance payments to my nominated financier (typically 2 payments) until such time as adequate funds are available in my account for Maxxia to process and pay the lease payments. Maxxia does not accept any responsibility for insufficient funds in my salary packaging account being available to make these payments.
- Maxxia is responsible for establishing my salary deductions with my payroll department for the amounts nominated by me.
- Maxxia will remit the nominated lease repayments on the specified date each month to the finance company providing adequate funds are available in my Maxxia salary packaging account.
- I understand that I am not able to claim reimbursement of lease payments that are required to be paid directly by me to the financier due to insufficient funds in my account
- If the residual value of my novated lease vehicle is greater than its market value at the end of the lease, I understand that I remain liable to the financier for the full residual amount due and any balance available in my salary packaging account at the end of the lease cannot be used to pay or reduce the residual amount due.

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### Section F: Salary Sacrifice Agreement

The employee and employer named in the Employee Information section of this application (“Employee” and “Employer” respectively) agree to be bound by the Salary Sacrifice Agreement Terms and Conditions, available online at [www.maxxia-sagov.com.au](http://www.maxxia-sagov.com.au) or by calling Maxxia toll free on 1300 123 123, and which together with this application comprise the Salary Sacrifice Agreement with the Employer.

The commencement date of this Salary Sacrifice Agreement is the date on which the Employee signs this application, subject to approval by the Employer’s delegate.

The Employee acknowledges and agrees:

- he/she is required to pay an employer charge of \$40 plus GST (\$44) to be paid direct from his/her post tax salary on the commencement of any new salary packaging agreement;
- to pay any costs arising from Salary packaging, including and FBT liability, and he/she indemnifies their Employer against this liability; and
- Maxxia Pty Ltd (“Service Provider”) is responsible for the administration of his/her Salary Sacrifice arrangements and any disputes or complaints should be resolved directly with the Maxxia.

### Section G: Salary Sacrifice Service Agreement

The Employee and Maxxia agree to be bound by the Salary Sacrifice Service Agreement Terms and Conditions, available online at [www.maxxia-sagov.com.au](http://www.maxxia-sagov.com.au) or by calling Maxxia toll free on 1300 123 123, and which together with this application comprise the Salary Sacrifice Service Agreement with Maxxia.

The commencement date of this Salary Sacrifice Service Agreement is the date on which the Employee signs this application, subject to approval by the Employer’s delegate.

The Employee:

- appoints Maxxia for the purposes of administering his/her Salary Sacrifice arrangements within the requirements of the Salary Sacrifice Service Agreement and acknowledges that all correspondence relating to these arrangements is to be directed to Maxxia;
- acknowledges that he/she is liable to pay Maxxia an administration fee depending on the benefits selected and will be shown on the Salary Packaging Confirmation Schedule sent to Employee before deductions commence;
- acknowledges that Maxxia and the SA Government are not financial advisers. You should consider seeking independent legal, financial, taxation or other advice to check how salary packaging and novated leasing relates to your unique circumstances.
- acknowledges that where he/she requests payment into a nominated account to pay for a benefit, he/she has direct debits in place from the nominated account for amount equal to or higher than the benefit amount (where relevant)
- acknowledge that Maxxia may receive commissions and rebates in connection with the provision of a fuel card.

### Section H: Execution of Salary Sacrifice Agreement and Salary Sacrifice Service Agreement

The commencement date of the Salary Sacrifice Agreement (or the Salary Sacrifice Agreement) is the date on which the Employee signs this application, subject to approval by the Employer’s delegate.

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

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**I understand and accept the terms and conditions of my Employer Salary Packaging Program.  
In addition, I understand and confirm that:**

1. I will be ineligible to claim a taxation deduction for all salary packaging payments made in relation to otherwise deductible items.
2. I will meet any cost including FBT liability arising from the implementation of my salary package.
3. I acknowledge that the SA Government is not a financial adviser. You should consider seeking independent legal, financial, taxation or other advice to check how salary packaging and novated leasing relates to your unique circumstances.
4. I acknowledge that Maxxia has recommended that I obtain professional financial and taxation advice on my particular financial circumstances before entering into any Novated Leasing and/or salary packaging arrangement.
5. Maxxia will handle your information in accordance with its Privacy Policy.

### Section I: Employee Declaration

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

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

Email your completed Application Form to: [selfmanaged@maxxia.com.au](mailto:selfmanaged@maxxia.com.au)

#### 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 financial and taxation advice on how salary packaging programs may impact your particular financial, taxation and welfare benefit circumstances. Maxxia may receive commissions from the fuel card provider. By utilising Maxxia services, you acknowledge the receipt of such commissions and rebates by Maxxia. 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](http://maxxia.com.au).

Maxxia Pty Ltd ABN 39 082 449 036 Authorised Representative (No. 278683) of McMillan Shakespeare Limited.

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