

23. Documents you must attach to this form:

(must be attached where these documents exist)

NOTE: Printed copies only. We cannot accept documents saved to CDs or USBs. Accounts can be emailed through only in Word, Excel or PDF formats.

- Copies of statements or passbooks for all bank accounts and loans for the entire accounts period indicated in question 2. (Internet banking printouts are acceptable if they contain name of account holder/s and show a running balance.)
- For bank term deposits a copy of the latest term deposit notice. Internet banking printouts are acceptable if name of account holder is shown.
- For any shares, investments or superannuation, a copy of all dividend notices or statements received during the year
- Documentation confirming accommodation payments are up to date e.g. nursing home statement or Department of Housing rental statement
- A copy of receipts for individual purchases or single expenditure in excess of \$500 (*excluding accommodation expenses*)
- A copy of the settlement statement for any properties purchased or sold
- A copy of all relevant insurance policies/certificates
- A copy of all relevant motor vehicle registration notices
- A copy of the latest tax assessment and if you are administering a partnership or business, a copy of the tax return
- A copy of the latest nursing home accommodation bond/deposit statement

Additional documents required when assets are valued at more than \$50,000 (as per figure at Q in this form)

(excluding a principal place of residence/nursing home accommodation bond/deposit)

- A copy of the tribunal decision
- A copy of your approved management plan (only required in the first year of providing accounts)
- A copy of the latest Centrelink or Department of Veterans Affairs income and assets statement