Australian Government

Australian Taxation Office

Withholding declaration

Complete this declaration to authorise your payer to adjust the amount withheld from payments made to you.

You must provide, or have previously provided, your payer with a completed *Tax file number declaration* (NAT 3092) quoting your tax file number or claiming an exemption from quoting it, before you can make a *Withholding declaration*.

- Refer to the Instructions to help you complete this declaration.
- Print neatly in BLOCK LETTERS.
- Print ✗ in the appropriate boxes.

Section A: **Payee's declaration**

❯ To be completed by payee.

1   What is your name?   Title: Mr ☐   Mrs ☐   Miss ☐   Ms ☐   Other ☐ _____

Family name

☐

Given names

☐

2   What is your date of birth?   Day ☐☐ / Month ☐☐ / Year ☐☐☐☐

3   What is your tax file number (TFN)? ☐☐☐ ☐☐☐ ☐☐☐

❯ For information about tax file numbers, see instructions.

If you have not provided your TFN, indicate if any of the following reasons apply:

☐ I have lodged a TFN application.

☐ I am claiming an exemption because I am a pensioner.

☐ I am claiming an exemption because I am under 18 years of age and do not earn enough to pay tax.

4   Are you: (select only one)

☐ An Australian resident for tax purposes

☐ A foreign resident for tax purposes

Or

☐ A working holiday maker

5   Do you want to claim the tax-free threshold from this payer?

Only claim the tax-free threshold from one payer at a time, unless your total income from all sources for the financial year will be less than the tax-free threshold.

Yes ☐   No ☐❯

Answer **no** here if you are a foreign resident or working holiday maker, except if you are a foreign resident in receipt of an Australian Government pension or allowance. You must answer **no** at questions 7 and 8.

6   Do you have a Higher Education Loan Program (HELP), VET Student Loan (VSL), Financial Supplement (FS), Student Start-up Loan (SSL) or Trade Support Loan (TSL) debt?

Yes ☐   No ☐

7   Do you want to claim or vary your tax offset by reducing the amount withheld from payments made to you?

Yes ☐   No ☐

Insert your estimated total tax offset amount. ❯ $☐,☐☐☐

8   Do you want to claim or vary the seniors and pensioners tax offset entitlement by reducing the amount withheld from payments made to you?

Yes ☐   No ☐

Are you:

☐ single   ☐ a member of an illness-separated couple   ☐ a member of a couple

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NAT 3093-06.2021

OFFICIAL: Sensitive (when completed)

DECLARATION BY PAYEE

Privacy

For information about your privacy, visit our website at **ato.gov.au/privacy**

➖ The tax laws impose heavy penalties for giving false or misleading statements.

I declare that the information I have given on this form is true and correct.

Signature of payee

	Day	Month	Year
Date	☐☐ /	☐☐ /	☐☐☐☐

Section B: **Payer's declaration**

❯ To be completed by payer.

YOUR DETAILS

1 **What is your Australian business number (ABN) (or your withholding payer number if you are not in business)?**

4 4 0 7 2 4 8 6 9 3 8

2 **What is your registered business name or trading name (or your individual name if you are not in business)?**

CHALLENGER LIFE COMPANY LIMITED

❯ **How much should you withhold?**

The payee's answers to questions 4 and 5 will indicate which of the weekly, fortnightly or monthly tax tables you should use as the base rate of withholding.

A **yes** answer at question 6 will require an amount to be withheld as specified in the Study and Training Support Loans tax tables.

A **yes** answer at question 7 or 8 will generally require a variation of the rate of withholding specified in the tax tables.

DECLARATION BY PAYER

Privacy

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I declare that the information I have given on this form is true and correct.

Signature of payer

	Day	Month	Year
Date	☐☐ /	☐☐ /	☐☐☐☐

Written notice

This declaration will constitute written notice under section 15-15 of Schedule 1 to the *Taxation Administration Act 1953* (TAA 1953) of the Commissioner's approval to vary the amount required to be withheld where:

- the payee has given a completed *Tax file number declaration* to the payer, or they have entered into a voluntary agreement with the payer.
- the payee has notified the payer of the varied rate of withholding in writing on this approved form at section A.

Storing and disposing of withholding declarations

The information in the completed *Withholding declaration* form must be treated as sensitive. Once you have completed, signed and dated the declaration, file the declaration form. **Do not send the declaration to us.**

Under the TFN guidelines in the *Privacy Act 1988*, you must use secure methods when storing and disposing of TFN information. Under tax laws, if a payee submits a new *Withholding declaration* or leaves your employment, you must still keep this declaration for the current and next financial year.

❗ **Do not send this declaration form to us.**