



Private company

- ▶ Use a separate form for each company.
- ▶ Each form can be used jointly for all Veterans' Affairs pensioners, Centrelink customers, and their partners, who are involved in the company. However, for privacy, you may choose to complete your own separate form.

If you need more space to answer any questions, please provide an attachment.

- ▶ Please write the company name on each attachment.

▶ **Definitions:**

'DVA' is the Department of Veterans' Affairs.

'DVA number' is the Veterans' Affairs reference number as shown on the letter sent to the DVA pensioner.

'CRN' is the Centrelink Number where a trust or company has an associated Centrelink customer. The CRN of relevant trusts and companies are shown on Centrelink letters sent to their customers.

Part A	Details of the private company																		
1 What is the name of the private company? 'Private company' is defined in the Information Booklet.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>This will be referred to as 'the company' on the rest of this form.</p>																		
2 Company Centrelink Reference Number (Company CRN) – if applicable	<div style="display: flex; align-items: center;"> <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: space-between;"> <div style="width: 25px; height: 10px; border: 1px solid black;"></div> <div style="width: 25px; height: 10px; border: 1px solid black;"></div> <div style="width: 25px; height: 10px; border: 1px solid black;"></div> <div style="width: 25px; height: 10px; border: 1px solid black;"></div> </div> <div style="margin-left: 10px;"> <p>If you know of a CRN for this company, please write that number here. If you do not know of a CRN for this company, please write 'NIL'.</p> </div> </div>																		
3 Tax File Number (TFN) of the company – if applicable	<div style="border: 1px solid black; width: 150px; height: 20px; display: flex; align-items: center; justify-content: space-between;"> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> </div>																		
4 Australian Business Number (ABN) of the company – if applicable	<div style="border: 1px solid black; width: 200px; height: 20px; display: flex; align-items: center; justify-content: space-between;"> <div style="width: 40px; height: 10px; border: 1px solid black;"></div> <div style="width: 40px; height: 10px; border: 1px solid black;"></div> <div style="width: 40px; height: 10px; border: 1px solid black;"></div> <div style="width: 40px; height: 10px; border: 1px solid black;"></div> </div>																		
5 Australian Company Number (ACN) of the company – if applicable	<div style="border: 1px solid black; width: 150px; height: 20px; display: flex; align-items: center; justify-content: space-between;"> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> <div style="width: 33px; height: 10px; border: 1px solid black;"></div> </div>																		
* 6 The person we can contact about details given on this form For example, yourself, your tax agent or your accountant	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Name of the person</td> <td style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td>Business name (if applicable)</td> <td style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td>Their position in relation to the company</td> <td style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td>Their postal address</td> <td style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td></td> <td style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td></td> <td style="border: 1px solid black; height: 20px; text-align: right; font-size: small;">POSTCODE</td> </tr> <tr> <td>Their daytime phone number</td> <td style="border: 1px solid black; height: 20px; display: flex; align-items: center;">[]</td> </tr> <tr> <td>Their fax number</td> <td style="border: 1px solid black; height: 20px; display: flex; align-items: center;">[]</td> </tr> <tr> <td>Their email address</td> <td style="border: 1px solid black; height: 20px;"></td> </tr> </table>	Name of the person		Business name (if applicable)		Their position in relation to the company		Their postal address					POSTCODE	Their daytime phone number	[]	Their fax number	[]	Their email address	
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	POSTCODE																		
Their daytime phone number	[]																		
Their fax number	[]																		
Their email address																			

*** 7 Contact person for future annual financial statements of the company**

For example: yourself, your tax agent or your accountant

Tick if the same as Question 6 ☐ Otherwise give details

Name of the person

Business name (if applicable)

Their position in relation to the company

Their postal address

Their daytime phone number

Their fax number

Their email address

POSTCODE

8 We will review the income and assets for the company annually to coincide with the lodging of the company income tax return.

In which month does the contact person want the annual review conducted?

[N/A. I have not financial interest in this company.](#)

The month chosen should be shortly after the company income tax return has been lodged.

9 Trading name(s) under which the company conducts business and the type of business of each

Trading name

Type of business
(e.g. primary production, retail, commercial, investment etc.)

10 When was the company incorporated?

11 Details of directors

1 Full name

Residential address

Date of birth

CRN or DVA number
(if known)

POSTCODE

2 Full name

Residential address

Date of birth

CRN or DVA number
(if known)

POSTCODE

3 Full name

Residential address

Date of birth

CRN or DVA number
(if known)

POSTCODE

12 Total number of shares issued by the company

Class	Number	Tick if voting rights attached	Tick if entitlement to dividends	Tick if entitlement to capital distributions on wind up
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13 Give details of all shareholders and their shareholding

Details of all **shareholders**

Full name	Date of birth	CRN or DVA number (if known)	Tick if related to:		
			Director(s)	Other shareholders	Other office-holders
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Details of the **shareholding** of each shareholder

Full name	Class of share	Number	Purchase price
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

14 In the last 5 years has anyone gifted, transferred or sold for less than market value, any investments, services, real estate or other assets, to this company?

This is referred to as 'contribution'.

No ☐ N/A

Yes ☐ Give details of each contribution

Name of contributor

Their date of birth

Is the person:

Nature of the contribution:

What was contributed?

Date of contribution

Value of contribution

Amount originally paid for it (if applicable)

 / /

Still living ☐

Deceased ☐

Gifted ☐

Transferred ☐

Sold for less than market value ☐

 / /
 \$

 \$

This **includes** any loans which may have been written off, waived or for any reason decided not to recover.

If a person has provided property or services to a company at any time after 7.30 pm Australian Eastern Standard Time (AEST) on 9 May 2000 and has not received adequate consideration in return, they may be considered to have made a contribution to the company.

Market value is the price a willing but not anxious purchaser is prepared to pay a willing but not anxious seller for an item.

What was contributed?

A contribution may be in the form of cash, investments, services or real estate. If the contribution was in the form of real estate, you must complete Part B about that real estate.

Date of contribution

If you are unsure of the exact date of the contribution please state the year and month. However, if the contribution was made in May 2000, it is important that you also state the full date.

Value of contribution

The value of a cash contribution is the amount contributed.

The value of services is the gross amount normally charged by a qualified person for a similar service.

The value of real estate contributed is the market value at the time the property was transferred to the company.

15 Does the company hold any shares in PUBLIC companies?

No ☐ N/A

Yes ☐ Please give details

All details required may be found on the certificate or statement for the share investment.

Include any futures, options, derivatives, rights or convertible notes or other securities listed on an Australian or overseas stock exchange held by the company.

Include shares, options or rights issues in a public company which are not listed on a stock exchange.

Name of the public company	ASX code	Type of shares held in the public company	Number of shares held in the public company
<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

16 Does the company hold any managed investments?

No ☐ N/A
Yes ☐ Please give details

All details required may be found on the certificate for the investment.

Managed investment is an investment with a company or trust where the assets are not held in the name of the investors or investors don't have control over the management of the assets but have a legally enforceable right to share in any distribution of income or profits derived from the investment – e.g. insurance bonds, friendly society bonds and public unit trusts.

Name of the fund manager	APIR code (if known)	Name of the product and product option	Number of units held (if applicable)	Value of the investment
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$

17 Does the company hold any shares in other PRIVATE companies?

No ☐ N/A
Yes ☐ Please give details

Name of the company	Company CRN (if applicable)	TFN	ABN

► You must complete a Private Company form for each of these companies

Company CRN

If you know of a CRN for any of these companies, please write that number. If you do not know of a CRN for a company, please write 'NIL'.

Tax File Number (TFN)

The Tax File Number of each private company can be found on the tax return for the company.

Australian Business Number (ABN)

The ABN of each private company will have been provided by the Australian Taxation Office. If the company has not received an ABN, please write 'NIL'.

18 Give details of the assets held by the company, other than real estate owned by the company and assets detailed in Questions 14 to 17

N/A

Type of asset

PLANT & EQUIPMENT	\$	<input type="checkbox"/>
MACHINERY	\$	<input type="checkbox"/>
VEHICLES	\$	<input type="checkbox"/>
LIVESTOCK	\$	<input type="checkbox"/>
STOCK	\$	<input type="checkbox"/>
LICENCES	\$	<input type="checkbox"/>

Other (describe)

	\$	<input type="checkbox"/>
	\$	<input type="checkbox"/>
	\$	<input type="checkbox"/>
	\$	<input type="checkbox"/>

The **current market value** is the price a willing but not anxious purchaser is prepared to pay a willing but not anxious seller for an item.

Please give an **estimate** of the value. You do not need to have these assets professionally valued. We may have DVA's licensed valuer do this at no cost to the company.

The company balance sheet usually shows assets at historical or Written Down Values (WDV). Please provide the Current Market Value (CMV) of these assets.

19 Does the company owe money to any associates?

N/A

Money owed by the company includes salaries and wages owed, loans made to the company, and dividends allocated to a shareholder that have not yet been paid to the shareholder.

No ☐

Yes ☐ ► Please give details of each amount owed

Name of associate	Their date of birth	Amount owed to this associate	Interest rate paid on the loan
	/ /	\$	%
	/ /	\$	%
	/ /	\$	%
	/ /	\$	%

Associate includes directors listed at Question 11 and shareholders listed at Question 13.

Associate also includes:

- spouse (including de facto)
- parents and grandparents
- children (whether biological, adoptive, step or foster) and their spouses, and the children of those parties and the spouses of those children
- siblings and their spouses
- nephews and nieces and their spouses, and the children of those parties and the spouses of those children
- uncles, aunts and their spouses, and the children of those parties, and the spouses of those children
- a professional adviser such as an accountant, solicitor or financial adviser who may be expected to act in accordance with a person's wishes
- a trustee of a trust from which a person is capable of benefiting under the trust directly or indirectly
- a (business) partner
- a company where the directors could reasonably be expected to act in accordance with a person's directions or wishes, or where a person and associates are able to cast more than 50% of the votes that may be cast at a general meeting of the company.

20 Is there a written loan agreement, witnessed by a third party, of a loan from an associate?

No ☐ N/A

Yes ☐ ► **You must provide a copy of each loan agreement**

For a liability of the company to be allowed by Centrelink/DVA, the amount owing would need to be documented by a written loan agreement signed by all parties to the agreement and witnessed by a genuine third party. Associates are not considered to be genuine third parties. A loan agreement witnessed by an accountant or solicitor who is not a family member may be allowed.

21 Are there any other liabilities of the company?

No ☐ N/A

Yes ☐ ► Please give details for each liability

Type of liability	Amount of liability	Asset secured against	Current market value of asset	Tick if this is a primary production asset	Tick if this is collateral security
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>

Type of liability includes bank loan, mortgage, fully drawn advance, personal loans not specified in Question 19.

Collateral security is fall-back security in the event that the primary security is insufficient.

22 Is the company a beneficiary of a private trust?

No ☐ N/A

Yes ☐ ► Please give details of each trust

Name of the private trust	Trust CRN (if applicable)	TFN	ABN

► **You must complete a Private Trust form for each of these trusts**

Trust CRN

If you know of a CRN for any of these trusts, please write that number. If you do not know of a CRN for a trust, please write 'NIL'.

Tax File Number (TFN)

The Tax File Number of each private trust can be found on the tax return for the trust.

Australian Business Number (ABN)

The ABN of each private trust will have been provided by the Australian Taxation Office. If the trust has not received an ABN, please write 'NIL'.

23 Did any shareholder or director receive, or were they entitled to receive, any INCOME from the company in the last financial year?

No ☐ N/A

Yes ☐ Please give details of each director/shareholder this applies to

This includes wages, salaries, director's fees, bonus shares, an income or capital distribution, superannuation contributions made on the person's behalf to a superannuation fund (except Superannuation Guarantee), etc.

Name	Their date of birth	Type of income	Total amount entitled	Total amount paid
	/ /		\$	\$
	/ /		\$	\$
	/ /		\$	\$
	/ /		\$	\$

24 Did any director or shareholder receive, or were they entitled to receive, any BENEFIT from the company in the last financial year?

No ☐ N/A

Yes ☐ Please give details of each director/shareholder this applies to

This includes non-cash benefits.

A person may enjoy an indirect or direct benefit from a company by, for example, having the company pay their personal living expenses, or having access to, or use of, a company asset.

Name	Their date of birth	Type of benefit	Value
	/ /		\$
	/ /		\$
	/ /		\$

25 Are there plans to wind up the company?

No ☐ N/A

Yes ☐ Please give details

When?

Why?

26 Are there plans for anyone to resign from or hand over their interest in the company?

No ☐ N/A

Yes ☐ Please give details

Who?

Their date of birth

When?

Why?

27 Does the company own any real estate?

No ☐ Skip the next four pages and go to **Part C Document Checklist**

Yes ☐ How many different titles does the company hold?

You must complete **Part B Company Real Estate** on the following page.

You will need to complete one Part B for each property. To obtain more copies of Part B, you can:

- **photocopy** Part B before completing it
- **print** Part B from the website www.dva.gov.au/dvaforms
- **request** copies by **phoning** 133 254 or Regional 1800 555 254

Part B**Company Real Estate Details**

A separate Part B must be completed for each real estate property held by the company

28 Name of the company which owns the real estate N/A

29 Company CRN – if applicable N/A

30 Australian Business Number (ABN) of the company – if applicable N/A

31 Address of the property N/A

POSTCODE

32 What type of property is this? N/A

- ☐ Vacant land
- ☐ Home office
- ☐ House
- ☐ Self contained flat (part of or attached to a residence)
- ☐ Units/flats/town house
- ☐ Retail premises
- ☐ Commercial premises
- ☐ Industrial premises
- ☐ Farm (or hobby farm)
- ☐ Market garden
- ☐ Home property larger than 2 hectares (5 acres)
- ☐ Home property 2 hectares (5 acres) or less on more than one title
- ☐ Other – please give details

If you live on the property and it is larger than 2 hectares, please answer Questions 33 to 35 otherwise go straight to Question 36.

33 How many years have you and/or your partner/husband/wife lived on this property? N/A

Self years

Partner years

34 Is the land being used, either by you or a family member, or leased, to produce an income? N/A

No ☐ ► Please tick any relevant boxes to explain why the land is not being used to produce an income.

- ☐ Rural residential block
- ☐ Land is not viable for commercial or agricultural use
- ☐ Caring responsibilities
- ☐ Health reasons
- ☐ Zoning restrictions
- ☐ Environmental restrictions
- ☐ Other (please explain)

Yes ☐ ► Please describe how you, your partner or other family member use the land (e.g. primary production, hobby farm, agistment, leased, rural residential, commercial kennels, feed lots).

35 Is this property in an
Exceptional Circumstances
area as declared by the
Department of Agriculture,
Fisheries and Forestry? No ☐ N/A
Yes ☐

36 Is there a residence on the
property? No ☐ N/A
Yes ☐

37 Who lives in this residence? N/A

38 What is the legal description
of the land? N/A
(e.g. lot, section, parish etc –
this may appear on the rates
notice) **You must provide a copy of the latest council rate/valuation notice.**

39 What is the area/dimension
of the land? N/A
Please complete **one** of these
measurements.

Area in hectares	<input type="text"/>
OR Area in acres	<input type="text"/>
OR Dimensions	<input type="text"/> X <input type="text"/>

40 Is the property made up of
more than one title? N/A No ☐
Yes ☐  Please attach copies of the title deeds (if you have them)
and/or the latest rates notices for our records.

41 What is your estimate of the
current market value of the
whole property, including land
and buildings? N/A \$
Please give us an estimate of the value. You do not need to
have the property professionally valued. We may have DVA's
licensed valuer do this at no cost to the company.

42 If the land on the title that
the principal home is on is
greater than 2 hectares: N/A

What is your estimate of the value of the residence and surrounding 2 hectares?	<input type="text"/> \$
What is your estimate of the value of the residence and all land on that title?	<input type="text"/> \$

43 Is the property held as security for any of the company liabilities? **N/A**

No ☐

Yes ☐ Please give details

Date of loan

Amount

Interest rate

Name of finance provider

Collateral security

44 Does the company receive any rental income from the lease of the property? **N/A**

No ☐

Yes ☐ Please give details

Amount of rent received

\$

Name of person renting property

45 Please describe all buildings on the property **N/A**

What is the floor area (approx)?

Building 1

Building 2

How old is the building?

Type of construction

Exterior (e.g. brick, timber)

Interior (e.g. plaster, not lined)

Roof (e.g. iron, tiles)

General condition

Number of flats/units (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

46 Are there any exceptional circumstances affecting the property? **N/A**

No ☐

Yes ☐ Please give details

This may include details such as no water on property for grazing livestock, lack of adequate fencing, hills, rocky ground, natural bushland, unusual title etc.

47 If the property would be hard to locate please give full directions to make the valuer's job easier **N/A**
– or provide a map

Authority to inspect the property

48 Company name N/A

49 Company CRN (if applicable) N/A

50 Australian Business Number (ABN) of the company N/A

51 Authority to inspect your property N/A

I , authorised officer, hereby authorise DVA's licensed valuer to enter and inspect the property situated at

for the purposes of a valuation in relation to the *Social Security (Administration) Act 1999* and the *Veterans' Entitlements Act 1986*.

I understand that if the property to be inspected is not occupied by the authorised officer, it is my responsibility to give the actual occupant reasonable notice, or such notice as is required by agreement, of the inspection.

This authorisation does not permit the valuer to enter the home of the authorised officer, or any dwelling the company may own, during the inspection, unless invited to do so. A similar condition applies to the home of any tenant.

I further understand that DVA's licensed valuer will contact the authorised officer, or the person noted below, to arrange a mutually convenient time for any necessary inspection of the property.

Authorised officer's signature

Person to be contacted by the valuer

Their daytime phone number

When you have completed Part B for each real estate property owned by the company, go to Part C Document Checklist

Why is a valuation required?

The social security law and the *Veterans' Entitlements Act 1986* requires that the value of assets (e.g. property, shares in a company, units in a trust) is included when calculating the amount of pension, benefit or allowance payable.

How is the value of a property decided?

The value of real estate is its current market value, less any allowable debts on the property. The 'current market value' is the price the owner could expect to receive if the property was sold.

What happens if there is no permission to inspect the property?

If the value of the property is likely to affect a person's entitlement to social security/DVA payments or the rate of payment, but no permission to value is provided, the person's payment may not be granted or payment may be stopped.

Please use the following checklist to make sure you provide all the required documents.

*** 52 You must provide COPIES of the following documents**

If a person is involved in more than one trust or company, you only need to provide these documents once.

The copies will not be returned.

[Attach if relevant.](#)

☐ Latest **personal** income tax returns for **Centrelink customers** and **DVA income support pensioners** who are involved in the company and will sign this form.

☐ Latest **personal** income tax returns for the **partners** of those Centrelink customers and DVA pensioners (regardless of whether the partners are involved in the company or not).

Each customer/pensioner/partner involved in the company must indicate that they have included their personal income tax return when they sign at Part D.

53 Please attach COPIES of the following documents which relate to the company

The copies will not be returned.

☐ Latest tax return for the **company** [N/A. This company acts as a trustee and is independent to me.](#)

☐ Profit and loss statement

☐ Depreciation schedule

☐ Balance Sheet

If applicable:

☐ Trading account details

☐ A completed Part B for each real estate property held by the company

☐ A copy of the council rates notice for each property held by the company

☐ Shareholder loan account details – individual account balances

☐ Notes to and forming part of the account

☐ Evidence of the company ceasing to trade

☐ Copies of any written agreements concerning loans involving associates to the company

☐ Any other information which would help us make a decision about who controls the company

54 If applicable, please attach the following document

[N/A](#)

☐ If the company is a beneficiary of a private trust, a completed Private Trust form and all required documents for that trust

☐ If the company has an involvement in another private company, a completed Private Company form and all the required documents for that company

55 Is this company an overseas company?

No ☐

Yes ☐ ► Please provide the last available financial statements for the company

56 If requested, you must make available the following documents which relate to the company

(Do not lodge them with this form – we will tell you if we need to see them)

- The Company Deed and amendments of this company

If applicable:

- The last return provided to the Australian Securities and Investments Commission (ASIC) for the company

- The title deeds for each property held by the company

- The certificates for share investments of the company

- The investment certificates for managed investments held by the company

- The loan agreement for each liability of the company (other than documents for loans from associates, which are required documents – see Question 47)

When you have completed this Checklist, go to Part D on the following page

Part D**Statement by Centrelink customers and DVA pensioners**

- * **57** Each Centrelink customer, DVA pensioner or partner who is involved in the company and who is providing their details on this form, must read and sign this statement

I declare that:

- to the best of my knowledge, the information given on this form is correct and the company documents provided are genuine.
- the personal income tax return I have provided (with this form or with another trust or company form) is a genuine copy.

I understand that:

- there are penalties for deliberately giving false or misleading information.
- Centrelink/Department of Veterans' Affairs may make any enquiries they believe necessary to help work out a customer's/pensioner's entitlement.
- the information asked for in this form is needed to decide if a Centrelink customer/Department of Veterans' Affairs pensioner is receiving the correct entitlement.

- * **1** Full name of customer/pensioner/partner

Date of birth

CRN or DVA number

Personal income tax return (for self and partner) provided:

☐

with **this** form

☐

with **another** trust or company form



Name of trust or company

* **Signature**

Date

- 2** Full name of customer/pensioner/partner (if applicable)

Date of birth

CRN or DVA number

Personal income tax return (for self and partner) provided:

☐

with **this** form

☐

with **another** trust or company form



Name of trust or company

Signature

Date

- 3** Full name of customer/pensioner/partner (if applicable)

Date of birth

CRN or DVA number

Personal income tax return (for self and partner) provided:

☐

with **this** form

☐

with **another** trust or company form



Name of trust or company

Signature

Date

- 4** Full name of customer/pensioner/partner (if applicable)

Date of birth

CRN or DVA number

Personal income tax return (for self and partner) provided:

☐

with **this** form

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Name of trust or company

Signature

Date

5 Full name of customer/pensioner/partner (if applicable)

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Personal income tax return (for self and partner) provided:

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6 Full name of customer/pensioner/partner (if applicable)

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☐ with **this** form

☐ with **another** trust or company form

▼
Name of trust or company

Signature

Date / /

**Remember to return your forms, tax returns and all
other required documents to:**

**Department of Veterans' Affairs
GPO Box 9998 Brisbane QLD 4001**

Privacy notice

Your personal information is protected by law, including the *Privacy Act 1988*. Your personal information may be collected by the Department of Veterans' Affairs (DVA) for the delivery of government programs for war veterans, members of the Australian Defence Force, members of the Australian Federal Police and their dependants.

[Read more: How DVA manages personal information](#)
