

Salary Packaging Application Form



Mail To	Fax To	Email To
Simplygreen Australia Pty. Ltd. 832 High Street, Kew East, Vic 3102	03 9249 9600	support@simplygreen.com.au

Step 1 - Your Personal Details

Dr/Mr/Mrs/Ms/Miss	First Name:	Last Name:
DOB:	Mobile:	
Home Address:	Suburb:	
State:	Postcode:	
Home Ph:	Work Ph:	Email Address:
Organisation Name:	Payroll No (if applicable):	
Gross Annual Salary (for salary packaging comparison purposes)	\$ _____	

Step 2 – Amount you wish to package

Amount you wish to package	Per Fortnight	Total Per Year
Capped Amount	\$	\$
Meal Entertainment	\$	\$
Leisure Accommodation & Venue Hire	\$	\$
Other Exempt Items *	\$	\$
Sub Total	\$	\$
Add our Fee	\$	\$
This is the amount that will be deducted from your pay	\$	\$

Step 3 – Attach Your Evidence

Description of Evidence Attached	Total Annual Value
	\$
	\$
	\$
	\$
	\$
Total Value of Evidence	\$
<ul style="list-style-type: none"> • Mortgages/Loans: Schedule of repayments from your bank • Rent: Payment Schedule or Rental Agreement from your Real Estate Agent • Credit Cards: Full statement of purchases to the value required • Receipts: In your, your spouse, or joint names • Superannuation: Statement for Super Fund Manager <p>The Total Value of Evidence should equal the Total Amounts you wish to Package (STEP 2). If not, you will need to forward evidence as required each month i.e. Credit Card Statements.</p>	

Step 4 – Nominate Account to deposit payment

Account Name	Bank Name	BSB or if credit card, Biller Code	Account No or Credit Card Number	Fortnightly Amount

Declaration

I confirm that the above information is true and correct. I understand that I am liable for any Fringe Benefits Tax that may be incurred due to incorrect information provided under this Salary Packaging Arrangement.

Signature: _____ Date: _____

Salary Packaging Terms & Conditions

Your employer has engaged Simplygreen Australia Pty. Ltd. ("Simplygreen") to provide Salary Packaging Services to eligible employees.

Simplygreen will only provide Salary Packaging services to you on the basis that it is approved by your employer to be eligible to participate in the salary packaging program.

Simplygreen will only provide salary packaging for those benefits identified in an approved list (Ref. Salary Packaging Manual).

Term

Simplygreen will provide Salary Packaging Services to you from the commencement date and shall continue for a period of time during which you elect to have your salary packaged administered by Simplygreen.

Salary Packaging – (In Advance)

A salary packaging arrangement must be entered into before you provide the services for which your Employer will pay salary and wages.

Application Forms / Substantiation Documentation

To commence salary packaging you are required to complete a Salary Packaging Approval Form and relevant Benefit Application Form. These forms must be signed and approved by your Employer.

Reimbursements and Benefit Payments will only be processed upon receipt of the signed and approved forms and the appropriate substantiation documentation.

You must guarantee that all information supplied to Simplygreen by you is true, complete and accurate in all respects and that you will notify Simplygreen immediately of changes to such information.

Acknowledgements / General Conditions

You acknowledge that;

- Prior to entering into salary packaging you should have sought independent qualified financial advice as the complexities of salary packaging can have a significant impact on your financial situation.
- Benefit payments and reimbursements will only be made by Simplygreen where it has received the expected payroll deductions for which you have submitted an appropriate Benefit Form. The payroll deductions must match the salary packaging deduction request indicated on the Benefit Form. Should a discrepancy exist between payroll deductions received by Simplygreen and payments requests, Simplygreen will notify you and your employer within forty-eight (48) hours of such a finding.
- Should insufficient funds be available to cover a payment transaction, no benefit payment will be made until sufficient funds have been received. Simplygreen will notify you and your employer within forty-eight (48) hours of such a finding.
- To be eligible to recover the Goods and Services Tax (GST) paid on a benefit you will be responsible to ensure that a "Tax Invoice" is obtained and submitted. A "Tax Invoice" must contain:
 - The ABN of the entity issuing it;
 - The GST inclusive price of the supply;
 - The words 'tax invoice' stated prominently;
 - The date of issue;
 - The name of the supplier and the recipient;
 - The address or ABN of the recipient;
 - A brief description of each item supplied; and
 - For each description – the quantity of the goods or the extent of the services provided.
- Should there be any changes to the employees personal details which Simplygreen hold on file (i.e. mailing address, bank account etc.) or changes to regular payment benefits (i.e. increases to insurance

premiums, etc.) Simplygreen must be notified by you in writing within five working days, or sooner if a benefit payment is required within this time frame.

- Where there are changes to the rate of GST, FBT or any other taxes or duties levied on Salary Packaged Benefits, or the manner in which all taxes and duties are calculated, your Total Employment Cost (TEC) established by your Employer will not increase as a result of such changes. Therefore, you will be required to meet the cost impost of such increases under the terms and conditions of the salary packaging arrangement.
- If surplus funds remain in your salary packaging account following a repayment or reimbursement transaction and you have no further salary packaging transactions to be undertaken – upon written request, surplus funds will be passed back to your Employer for payment to you as ordinary salary and wages. The amount will be assessable as income and subject to income tax at your marginal tax rate.
- To be eligible to salary sacrifice work related items, you must use the work related items primarily for work purposes
- Additional superannuation contributions will only be made to a complying superannuation fund that complies with the Superannuation Industry (Supervision) Act and Regulations. It should also be noted, that your Employer may impose limits on the amounts of salary packaging for superannuation based upon the Australian Tax Office (ATO) “Age Based Contribution Limits”.
- In the event that your employment ceases with your Employer you agree to provide to Simplygreen written notification of such termination of employment as soon as is practicable.
- Upon the termination of employment or the cessation of you receiving a salary package benefit for any other reason, Simplygreen will cease the provision of services in respect of you, or in the case of ceasing a salary packaged benefit, cease provision of the benefit and any further payments to suppliers/vendors.
- On the cessation of benefits or salary packaging Simplygreen will issue a statement of the total balances outstanding. A credit balance will be passed back to your Employer for payment to you. This amount will be assessable as income and subject to income taxed at your marginal tax rate. Debit balances will be paid to Simplygreen forthwith on the receipt of statement. It should be noted that were employment is terminated and there is a debit balance in your salary packaging account, the debit balance must be paid from after-tax salary and wages (i.e. it cannot be salary packaged).
- The fees outlined in the Salary Packaging Manual are the Employers’ Costs, however, in accordance with the Salary Packaging Manual, the fees will be recovered from your package as a cost recovered by your Employer in the administration of your salary package. Simplygreen maintain the right to increase administration fees at its discretion and notify your employer and you in writing and by publication on the Simplygreen website.

Leave

Should you be absent from your employment on leave with “full pay” then deductions will continue to be made and benefits provided during the period of leave.

Should you take leave of absence “without pay” from your employment then deductions cannot be made as you are not receiving salary. You will need to arrange payments from your own resources for this period.

Simplygreen would require written notice from you prior to taking leave without pay.

Privacy Notice

You do not have to provide your personal information on this form. We collect and use personal information for the various purposes, including for contacting and communicating with you, research, marketing and business development. We may disclose the information for the purpose of providing products and services to customers, and as required by law. We may disclose information to third parties including parties located overseas. You may request access to personal information we hold about you or make a complaint by sending an email to info@simplygreen.com.au or contacting us by phone on 1300 664 323. For more information about our privacy practices you may visit our website where our Privacy Policy is available to be viewed in full.