

Gross interest questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

1. Did you receive any interest during 20__ income year? **YES/NO**

If **no**, you do not have to complete the remainder of this questionnaire and **no** amount gets shown at **Item 10** of the 20__ income tax return form.

2. Please provide details of any interest received for bank accounts in **your name only**:

Bank/Finance Institution	Account number	Interest	TFN withholding
Total			

***Note:** If you are a non-resident and no withholding tax has been deducted, you should declare the interest in your tax return. When your tax return is processed, a tax liability based on the withholding tax that should have been withheld, will result.*

3. Did you receive any interest in **joint names**? If **yes**, then provide details: **YES/NO**

Bank/Finance Institution	Account number	Share of interest	TFN withholding
Total			

4. As per the table completed above, are you seeking to declare interest in different proportions to your interest in the account?

YES/NO

5. If **yes**, please provide details on why this is the case:

Taxpayer's gross interest declaration

- A. *I confirm that the above details in relation to gross interest are correct;*
- B. *My tax agent has explained to me the law and income tax lodgment requirements as they relate to gross interest; and*
- C. *I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.*

Signed

Dated