



Claim for Reimbursement From Clergy Benefit (Salary Sacrifice) Account

Parish _____

Clergy/Employee Name: _____ Contact Telephone: _____

EC (see over page)	Description of Benefit <small>(The Eligible Category number and description of the item must be completed. Eligible categories are listed on the reverse side of this sheet)</small>	Amount of Purchase <small>(includes GST, if any)</small>		GST on Purchase <small>(if any)</small>		Invoice Attached <small>Y-Yes N-No</small>
		\$	c	\$	c	
Totals						

(If there is not enough space in this table, please attach another completed form)

Payment Details: Please reimburse these expenses to the following account:

Bank: _____ Account Name: _____

Branch: _____ BSB: _____ - _____ Account Number: _____

Declaration by Employee/Clergy claiming reimbursement:

1. I seek reimbursement of the expenses from the Benefit Account listed in the schedule on the reverse of this form.
2. I attach tax invoices or other evidence that the expenses have been paid by me or my immediate family and have not been reimbursed from any other source.
3. The expenses have been incurred to provide benefits that are eligible for reimbursement under the Remuneration Packaging Policy of the Anglican Diocese of Bathurst.
4. There are sufficient funds in the Benefit Account to enable reimbursement of this claim.
5. The expenses will not be claimed as deduction for income tax purposes by me or any member of my immediate family.

Signature: _____

Date: _____ -

Eligible Benefits Categories (EC):

- 1. Private housing expenses of the employee and his/her immediate family:**

Board or rent	Council rates	Electricity, water or gas supply
Telephone costs	Conveyance costs	House and contents insurance
Renovation/improvement costs	Removal costs	Real estate transaction (e.g. Solicitor fees, Real Estate commission)
Loan repayments (See Important Information A)	House cleaning and maintenance services (e.g. pest control, mowing)	Furniture, furnishings and Appliances
- 2. Motor vehicle operating expenses:**

Registration and third party	Comprehensive Insurance	Petrol
Regular service costs	Repairs and maintenance costs	Loan repayments (See Important Information A)
- 3. Education expenses of the employee and his/her immediate family:**

School fees and levies	School camps/excursions	Uniforms
Tertiary institution fees (e.g. HECS)	Text books/tuition costs (music, cultural and sporting)	Tuition related equipment costs
- 4. Personal computers:**

Purchase costs	Software costs	Repair and maintenance costs
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- 5. Memberships:**

Private	Cultural	Sporting associations (e.g. gym) Health associations (e.g. Jenny Craig, Weight Watchers)
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- 6. Child-care costs:**

Payments are eligible as long as the child-care facility is a registered provider
- 7. Medical costs: (BUPA, Medicare, HCF etc.)**

Medical insurance premiums, insurance excesses, out-of-pocket dental and medical expenses
- 8. Personal insurance premiums (NRMA, Suncorp, AAMI, RACQ, etc.)**
- 9. Personal loan repayments:**

Excluding loan repayments for which the employee claims a tax deduction (See Important Notes A)
- 10. Insurance savings plan contributions**
- 11. Travel for private, business or study purposes**
- 12. Travel and accommodation components of personal holidays**
- 13. Private-related entertainment and hospitality expenses**
- 14. Personal stewardship contributions to a parish or church agency:**

Provided the contribution is voluntary and confidential, and is not made under duress (i.e. if the parish requests a cut in the clergy stipend)
- 15. Costs of a credit card for use in remuneration packaging arrangements**
- 16. Other personal costs:** Clothing, groceries, hardware, pharmacy, department stores e.g. Myers, David Jones

Important Information:

- A:** If you're claiming a loan repayment you must provide an official document from your bank outlining the repayment amount, terms and conditions of the loan. If this is not provided The Diocese is not able to process this EC item.
- B:** The Diocese has been advised that the Australian Taxation Office will not allow cash or cash-style payments (e.g. deposits) from Benefit accounts. Cash withdrawals from housing loans, credit card accounts, investment savings plans or other similar accounts, to which payments are made as exempt benefits by the employer, may cause the employee to be liable to pay income tax on the amounts withdrawn. Employees may also be subject to penalties.
- C:** Expenses for which an employee claims a taxation deduction cannot be reimbursed as a benefit. Expenses that are reimbursed as a benefit cannot be claimed as a taxation deduction.
- D:** GST incurred must be supported by a tax invoice for it to be reimbursed to the Clergy Benefit Account.

Remember:

- ✓ Complete the front of this form and read the declaration before signing (forms may not be processed without a signature).
- ✓ List the eligible category for each expense, describe the expense and attach receipts or evidence of payment.
- ✓ Do not claim for amounts in excess of the balance of the benefit account. If in doubt about your balance, contact accounts@bathurstanglican.org.au

Email completed claim & tax invoices to : email – accounts@bathurstanglican.org.au