



Industry and Investment NSW (I&I NSW)
Payroll Tax Incentive Scheme - Claims Section
Enterprise, Small Business and Regional Development Unit
GPO Box 5477
Sydney NSW 2001

Payroll Tax Incentive Scheme – Claim Form 2008-09

(Claims must be made by 31 March 2010.)

SECTION A - COMPANY INFORMATION

Company details			
Company Name			
Trading Name			
Business Address			
Postal Address			
Website			
ABN (if applicable)		ACN (if applicable)	
N.S.W. Payroll tax client ID	_____		

Contact details

Company Contact		Title/Position	
Telephone No.		Fax No.	
Mobile No.		Email Address	

Business structure/ownership

Have the main activities of the business changed since the last claim? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe:
Has the business been acquired by another entity or group since the last claim? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe
Has the business been restructured through the movement of assets or employees since the last claim? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe
Have ownership details (include partners, main shareholders, holding company, etc) changed since the last claim? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe
Have related and grouped entities changed since the last claim? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe:

Eligible location/address

Have the eligible locations listed in the application changed since the application was completed? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, describe:

Investment Activity

Please specify the level of investment activity for the financial year following this claim period, (being the current financial year).	
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Financial Results

Note: The estimates provided here are for the purposes of helping I&I NSW to forecast future liabilities. The payroll tax rebate is paid as a percentage of actual payroll tax paid.

Rebate Year	1	2	3	4	5
Financial Year	08/09 actual	09/10 estimate	10/11 estimate	11/12 estimate	12/13 estimate
Sales – \$ '000					
Percentage exported					
No. Employees (FTE* all Australia)					
No. Employees (FTE* NSW only)					
No. Employees (FTE* PTIS eligible area)					
Wages – \$ '000 (all Australia)					
Wages – \$ '000 (NSW only)					
Wages – \$ '000 (PTIS eligible area only)					
Payroll tax liability (all NSW)					

* FTE - full-time equivalent based on 35 hour week ie. $fte = (total\ hours\ worked\ for\ period) \div (35 \times No.\ weeks\ in\ period)$

Value of rebate

The rebate payable at the end of each financial year will be proportioned on the basis of wages paid to employees in eligible areas and on grouping arrangements. I&I NSW will calculate the value of the rebate and contact you to arrange a tax invoice to be provided for the amount.

If you would like to estimate your potential rebates please download the PTIS Rebate Calculator from www.business.nsw.gov.au/region/ptis. If you have any issues with the calculation of the rebate you should contact your local I&I NSW representative.

Payments made under this agreement will be by I&I NSW's service provider, Service First. Please indicate your preferred payment method:

- Cheque
 Electronic Funds Transfer (EFT)
 (the payer reference will be "Department of Commerce - CCSU")

Postal Address

Account details

BSB:	Account No:
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Reassessed applications

I&I NSW advises that in cases where OSR conducts a reassessment of a company's payroll tax liability, which results in an under or overpayment, the following actions will be taken:

- In the case of an overpayment by I&I NSW, I&I NSW will take action at the earliest opportunity to recover the outstanding amount.
- In the case of an underpayment by I&I NSW, the company will need to provide documentary evidence to I&I NSW of the amount owing, as advised by OSR. I&I NSW will then take action to reimburse the outstanding amount, as appropriate.

SECTION B - DECLARATION

Any personal information provided to the Department is voluntary and protected by the Privacy and Personal Information Protection Act 1998 (NSW) and the Health Records and Information Privacy Act 2002 (NSW). The information is essential to process your claim for a rebate. Please refer to our website www.business.nsw.gov.au for more information on our privacy policy and your rights to access or correct the information.

I&I NSW will confirm with the Office of State Revenue your payroll tax payments and grouping arrangements for the financial year and that you have no outstanding payroll tax liabilities before making your rebate payment.

I have read and acknowledge the above declaration with respect to assistance under this program. I certify that the information provided in and supporting this claim for payroll tax rebates is true and correct and that I am legally authorised to sign this claim for and on behalf of the applicant company/organisation.

Signed _____ **Date** _____

Name _____ **Position** _____

Please mail to Industry & Investment NSW, Manager Payroll Tax Incentive Scheme, Enterprise, Small Business and Regional Development Unit, GPO Box 5477, Sydney, NSW, 2001.

OFFICE USE ONLY

Payroll tax grouping & payment confirmation from OSR *Rebate amount checked*

Approved by: Name _____ *Position:* _____ *Date:* _____