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SALARY PACKAGING

Employee form - investment loan interest reimbursement

Please complete this form and email to salarypackaging@trinitas3.com.au

I, _____ on behalf of
(name of employee)

(name of employer)

declare that the expense payment benefits, described below, are provided during the FBT year from 1 April 20_____ to 31 March 20_____ are payments or reimbursements of expenses which, under the 'otherwise deductible' rule, would have a taxable value of nil.

Interest on investment loan of type

The employee's share in the ownership of the property or share of portfolio is _____ per cent

The property is available for rent 100 per cent by arms length transaction

The loan is in sole or joint names

The loan is used exclusively for the purchase of investment property/shares/investment assets and does not include borrowings for any other purpose

There is no redraw facility on the loan

Other: _____

(show sufficient detail to enable identification of the relevant benefits, eg type of expense)

Signature