

# Transition Application Form



## Employee Information

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Surname: \_\_\_\_\_  
 Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Email: \_\_\_\_\_  
 Address: \_\_\_\_\_ Suburb: \_\_\_\_\_  
 State: \_\_\_\_\_ Post Code: \_\_\_\_\_ Mobile: \_\_\_\_\_  
 Name of Employer: \_\_\_\_\_ Payroll Identification Number: \_\_\_\_\_

### 1A. Regular Benefit Payments maximum \$15,900 per FBT year

Please confirm which regular expense benefits (e.g. mortgage, rent, personal loans) you want automatically deducted as weekly direct payments from your salary packaging account.

Benefit item	Weekly Deduction	Account name	BSB number	Account number
E.g. Mortgage	\$305.76	J.Smith	000 000	12 34 56

### 1B. Living Expenses maximum \$15,900 per FBT year - Maxxia Wallet

The Maxxia Wallet is the simple way to package your everyday living expenses, like groceries and bills.

If you want to salary package the Maxxia Wallet for living expenses, please tick the below box and nominate the amount you would like to allocate to the card each fortnight.

Deduction \$ \_\_\_\_\_ eg: \$305.76

The charge is \$4.40 per benefit, per month (GST incl). This will be salary packaged and your deductions automatically increased to cover the charge. International transaction fees and disputed transaction fees apply. Please refer to the Wallet's product disclosure statement for more information available at [live.maxxia.com.au/pds](http://live.maxxia.com.au/pds)

### 2A. Meal Entertainment maximum \$2,650 per FBT year - Maxxia Wallet

The Maxxia Wallet is the easy way to package your dine-in meal expenses.

If you want to salary package the Maxxia Wallet for meal entertainment, please tick the below box and nominate the amount you would like to allocate to the card each fortnight.

Deduction \$ \_\_\_\_\_ eg: \$50.96

The charge is \$4.40 per benefit, per month (GST incl). This will be salary packaged and your deductions automatically increased to cover the charge. International transaction fees and disputed transaction fees apply. Please refer to the Wallet's product disclosure statement for more information available at [live.maxxia.com.au/pds](http://live.maxxia.com.au/pds).

### 2B. Meal Entertainment/Venue Hire maximum \$2,650 per FBT year - Manual Claims

You can submit manual claims for the below benefit items via the Maxxia app and Maxxia Online.

Venue Hire allows you to claim for accommodation expenses and venue hire.

Venue Hire fortnightly deduction amount \$ \_\_\_\_\_ eg: \$50.96

Meal Entertainment allows you to claim all your dine-in expenses.

Meal Entertainment fortnightly deduction amount \$ \_\_\_\_\_ eg: \$50.96

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## Employee Declaration (signature and date required)

- You accept all terms and conditions of your Employer's salary packaging program
- You will be ineligible to claim a taxation deduction for all salary packaging payments made in relation to otherwise deductible items
- You will meet any cost including an FBT liability that may arise from your salary packaging arrangements
- You will maintain all records for a period of five (5) years in relation to any payments made by Maxxia
- You will make these records available to Maxxia, your employer, or the Australian Taxation Office as and when required.

### If you add or make changes to your mortgage arrangements:

- You are not salary packaging mortgage repayments that are linked to an interest offset facility account
- You hold the necessary substantiation for your mortgage, including a copy of the loan contract, and statements of the mortgage account evidencing the payment of the mortgage
- You retain and maintain all records in relation to any payments made by Maxxia in respect of your mortgage for a period of five (5) years
- You undertake to make these records available to Maxxia, your employer, or the Australian Taxation Office if requested
- You will immediately notify Maxxia of any change to the status of your mortgage account
- Where Maxxia is reimbursing you for your mortgage benefit, you acknowledge that you have made arrangements for your financial institution to direct debit this account for payment to your mortgage.

Employee Name (print): \_\_\_\_\_

Employee signature: \_\_\_\_\_ Date:     /     /

Return the completed form to: [saoffice@maxxia.com.au](mailto:saoffice@maxxia.com.au)

### DISCLAIMER

Maxxia provides administration and referral services on behalf of employers. It does not provide any form of financial, taxation or financial product advice to employees on the relative merits of package programs or on any other basis. Some information on taxation matters may be provided to illustrate possible advantages, but is of a general nature only. You should seek your own independent professional advice on how packaging programs may impact your particular financial, taxation and welfare benefit circumstances. Maxxia may receive commissions or rebates in connection with some services it provides or arranges to be provided by third parties. By appointing and utilising Maxxia services, you consent to its receipt of such commissions and rebates. Tax laws regarding the treatment of salary benefits may change, which could adversely impact your financial, taxation or welfare benefit decisions.

The Maxxia Wallet is issued by Heritage Bank Limited ABN 32 027 652 024, AFSL 240984 ACL 240984. Maxxia Pty Ltd (Maxxia) acts as authorised representative of EML Payment Solutions Limited AEN 30 131 455 532, AFSL 404131 as distributor of the Maxxia Wallet. For more information about the card please read the Product Disclosure Statement, which is available at [live.maxxia.com.au/pds](http://live.maxxia.com.au/pds)

### PRIVACY

Maxxia is committed to protecting the privacy and rights of its customers. Our Privacy Policy contains important information about how we collect, hold, use and disclose personal information. It explains what happens if we cannot collect your personal information, as well as how you can access and correct the personal information we hold about you, or make a complaint. If you do not wish to receive promotional material from us, or would like a copy of our Privacy Policy, please contact us on 1300 123 123. Our Privacy Policy is also available at [maxxia.com.au](http://maxxia.com.au)

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