

## Financial counselling fees declaration

(Only required if salary packaging as an FBT exempt benefit item)

I, ..... employed by  
(Employee name)

..... declare that  
(Employer name)

the financial adviser fees being reimbursed to me or paid directly to:

.....  
(Name of licensed financial adviser, chartered accountant or certified practising accountant)

on my behalf during the period from ..... to .....  
(date) (date)

were **not** expenses incurred by me for initial advice in regard to drawing up an investment plan, but were expenses incurred **solely** in relation to reviewing the personal investment strategies and decisions arising from the investment plan received from my current financial adviser.

The expenses were incurred in the course of earning my assessable income, and therefore did not relate to matters such as superannuation, termination payments, redundancies, salary packaging arrangements, novated leases, trust funds, estate/retirement planning, etc.

I also declare that the percentage of those expenses incurred in earning my assessable income was

..... per cent.

Signature: ..... Date: .....

### Privacy notice

The salary packaging administrator is collecting your personal information on this form for the purpose of processing your salary packaging agreements. The salary packaging administrator will pass your personal information on to your agency's payroll section as part of the administration of your salary packaging agreements, Queensland Government Procurement in relation to the management of the salary packaging arrangement, and Queensland Treasury for auditing purposes. Your personal information will not be used for any other purpose or disclosed to any other third party, without your consent, unless authorised or required by law.

Financial Counselling Fees Declaration V3.0 – 7 November 2016