

Financial documents guide – Serious Injury applications

About this guide

The purpose of this guide is to help your client provide a complete and relevant serious injury application to the TAC.

If your client is claiming economic consequences as a result of a transport accident, supplying the documents listed in this guide will help ensure the TAC can assess your client's application as quickly as possible.

Financial documents typically provided with a Serious Injury application

Employee

- / Individual Income Tax Return(s)
- / Notice of Assessment(s)
- / PAYG Payment Summary from employer(s)

Self-employed person

- / Individual Income Tax Return(s)
- / Notice of Assessment(s)
- / PAYG Payment Summary from employer(s)
- / Documents supporting payment of any substitute labour post-accident
- / Financial Statements for the Business, including:
 - Profit and loss statement, balance sheet, and notes to the financial accounts.
- / Business Taxation Material (for a Company, Trust, or Partnership) including:
 - Business Income Tax Return
 - Business Activity Statements

Other financial materials which may be readily available (depending on the circumstances)

- / Pay slips (if PAYG payment summaries unavailable)
- / Business source records to support revenue and expenses of a business, such as:
 - Accounting general ledger records, payroll reports, sales invoices, expense records, bank statements.



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