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**DEPARTMENT OF IMMIGRATION AND MULTICULTURAL  
AND INDIGENOUS AFFAIRS**

Ms Sue Morton  
Secretary  
Australian Senate Select Committee on Superannuation  
Parliament House  
Canberra ACT 2600

Dear Ms Morton

**INFORMATION TO MIGRANTS ON TAXATION OF TRANSFERS FROM OVERSEAS  
SUPERANNUATION FUNDS**

I refer to your letter of 24 May 2002.

Thank you for the opportunity to provide input into the Committee's deliberations. I appreciate the reason why the migration application packs (which currently contain no information on taxation or superannuation) might be seen as a possible vehicle for delivering information to prospective migrants on superannuation matters. We often receive requests to include information that might be useful to prospective migrants or to collect information to assist other agencies.

Migration application packs are entirely focused on the collection of information that will enable departmental decision-makers to decide applications. As you can see from the attached pack relating to business skills migration (we have different packs for different types of applicant and this is by no means the largest), size is a real issue for us. Despite the limited objective of only collecting information to enable a decision to be made, this pack runs to almost seventy pages of information and forty pages of forms.

Not surprisingly, some of the most common criticisms of our packs relate to their size, complexity and capacity for a key element to be "lost" in the sheer volume of information provided in the pack. The direction of our efforts to improve the packs is aimed at simplifying them to make them more user-friendly to our clients. We have also put all our forms on the department's website and are progressively developing appropriate electronic lodgement facilities (although it will be some time before we complete all our high volume simpler applications before starting on the lower volume and much more complex migration applications).



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RECEIVED TIME 15. JUL. 11:57

PRINT TIME 15. JUL. 11:58

61 6 2641060

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I would suggest that the utility, client impact and cost of changing the forms need to be carefully considered before any decision is made to add additional information or data collection requirement to the department's forms. I also believe that there are alternatives to including detailed information on superannuation in the migration application packs. These include:

- inclusion of a short reference to superannuation matters in one of two pages devoted to "Living in Australia" (pages 8 and 9 in the attached pack) and include a reference to the appropriate (presumably ATO) website;
- we could work with the Australian Taxation Office to have their targeted information leaflets available in DIMIA offices (both in Australia and overseas) to inform prospective migration applicants about not only superannuation matters of importance but taxation matters as well and allow collection of information on foreign superannuation benefits; and
- it would also be relatively easy (and low cost) to provide a link to the relevant part of the ATO website from different parts of the DIMIA website under a banner along the lines of "want to know more about taxation or superannuation matters – click here".

All these approaches could be pursued either individually or in combination and they should also have more impact on temporary residents and others who become "tax residents" in Australia without becoming migrants (or coming in contact with any of the migration packs).

I hope the above information is of assistance to the Committee.

Yours sincerely



Bernie Waters  
Assistant Secretary  
Business Branch

15 July 2002