

Victoria's taxi and hire car industry is changing

APPLICATION FOR
ACCESS TO THE
FAIRNESS FUND



The Victorian Government's Fairness Fund is now open for applications.

The Victorian Government reforms to the commercial passenger vehicle industry announced on 23 August 2016 will ensure high standards for all commercial passenger vehicles, including taxis, hire cars and ride share services.

The Fairness Fund is needed because proposed reforms to the commercial passenger vehicle market, while benefiting customers, are also affecting people who own a taxi or hire car licence. Funding will provide targeted financial support to those licence holders who need it most.

The Fairness Fund is separate to the previous \$4 million Taxi Reform Hardship Fund. Significantly more funding is available to provide support now, and the eligibility criteria for payments are different because the reforms affecting the industry are different.

The Fairness Fund is also separate to assistance payments. After the Government's industry reforms become law, assistance payments will be available to all perpetual and fixed-term licence holders where the licence fee was paid up-front (not in annual instalments). Eligibility for assistance payments will be assessed and paid in addition to any payment you receive from the Fairness Fund.

Who will be eligible?

People who had an ownership interest in a taxi or hire car licence at any time in the period 1 January 2016 to 23 August 2016 and who are facing significant financial hardship as a result of the proposed reforms may qualify for an assistance payment where any or all of the following can be demonstrated:

- A lack of current income or the loss of a future income stream that is significantly impacting on household spending capacity
- Significant difficulty in meeting ongoing debt obligations related to the licence(s) held
- A lack of available funds to meet financial commitments

Special consideration may also be given to applicants with extenuating circumstances that are resulting in financial hardship of a different nature to that set out above.

When should I apply?

The Fund is now open and will close to new applications on 30 April 2017.

Applications will be assessed as soon as they are received. Early payments will be made available to eligible applicants in priority cases, before the Fund closes. The sooner you apply, the sooner those eligible will be able to receive their payment.

You can help ensure your application is assessed quickly by providing accurate and complete information on the form provided.

If you are planning to apply for support from the Fairness Fund, make sure you send your application by the closing date.

Assessment of your application

To establish eligibility, applicants will be means-tested and assessed against a set of guidelines supporting the outlined eligibility criteria. Eligibility will be reviewed on a case-by-case basis and will be determined based on a number of factors, including income, indebtedness and availability of funds. Your eligibility can only be determined if you provide full and accurate information in your application. Should there be multiple persons with an interest in the same licence, then each individual with an ownership interest should consider the eligibility criteria, and if applicable, submit an application as it relates to their own financial circumstances. Such applications should not be submitted jointly, unless as part of the one family unit. Please note this application requires you to complete a Statutory Declaration in order to certify that the information you provide is true and correct, and that you have not knowingly omitted any information.

Information and documentation provided in the application is subject to audit and additional information may be requested after the form has been submitted.

This application form consists of five Sections:

- Section 1. Background
- Section 2. Applicant Claim
- Section 3. Income
- Section 4. Assets and Liabilities
- Section 5. Statutory Declaration

When completing this application form:

- Print clearly using blue or black ink. Print 'X' in the appropriate boxes where requested
- You can also complete the application form on your computer and then print it out to sign it
- Never send originals of any documents you include – submit copies
- Clearly label any documents you enclose with your name and the relevant section that the information is supporting
- Please do not staple the application or supporting information

To be considered for access to the fund you must:

- Submit this application form by 30 April 2017
- Sign the Statutory Declaration on page 12
- Send the application form and attachments to:

Fairness Fund
GPO Box 2392
Melbourne VIC 3001

Or email to: fairnessfund@ecodev.vic.gov.au

Where can I get help with my application?

The Government has engaged WESTjustice to assist licence holders with Fairness Fund applications. WESTjustice can be contacted as follows:

Footscray Office

Level 1, 72 Buckley Street, Footscray, VIC 3011
E: admin@westjustice.org.au
T: (03) 9749 7720
F: (03) 9749 8276

Werribee Office

Level 1, 8 Watton Street, Werribee, VIC 3030
E: admin@westjustice.org.au
T: (03) 9749 7720
F: (03) 9749 8276

Section 1. Background

Section 1.1 Applicant details

Title (mark with 'X') Mr Mrs Miss Ms Other (specify)

Family name

First given name

Second given name

Date of birth

Postal address

State

Postcode

Email address

Telephone number

Section 1.2 Taxi or hire car licence ownership

Note: An ownership interest in a licence(s) can be held directly or through a related entity, such as a company or trust.

Did you have an ownership interest in a taxi or hire car licence(s) at any time during the period 1 January 2016 to 23 August 2016? (mark with 'X') Yes No

If No, you are ineligible to receive a payment from the Fund, do not proceed with the form.

If Yes, please provide the following details for your licence(s):

| Licence number | Registered licence owner (e.g. personal name, company, family trust) | Type of licence (e.g. perpetual, 10 year fixed term, annual) | Ownership % | Acquisition price \$ | Date acquired |
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Section 2. Applicant claim

Section 2.1 Basis of claim

In the box below, briefly describe the circumstances of your financial hardship, explain how you consider this to be a direct result of the announced Victorian taxi and hire car industry reforms. Where relevant, please describe any actions you may have taken to address your financial situation (e.g. sale of assets, refinancing of debt).

Section 2.2 Partner and dependants

Do you have a partner and/or dependants? (mark with 'X')

Yes

No

If No, go to [Section 3.1](#)

If Yes, please provide the following details of your partner and/or dependants:

| Name | Relationship to you | Age |
|------|---------------------|-----|
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Section 3. Income

Section 3.1 Income

Provide copies of you and your partner's income tax return and Notice of Assessment for the financial year ended 30 June 2016. If you or your partner's income level has changed since 30 June 2016, provide the last 3 pay advices and other relevant information to support the current income level. It is not necessary to disclose your Tax File Number. Any income not detailed on the income tax return should be supported by relevant evidence.

Note: Income declared should include, but not be limited to, wages, income from the licence(s) held, businesses owned, rental income, interest, dividends, pensions, Centrelink income, and any income from another Government department.

Did you and (if applicable) your partner earn income during the period 1 July 2015 to 30 June 2016? (mark with 'X') Yes No

If No, go to [Section 4](#)

If Yes, please provide the following details of the income earned by you and (if applicable) your partner:

| Individual's name (i.e. you and if applicable, your partner) | Net income after tax for the financial year ended 30 June 2016 \$ |
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Section 3.2 Assignment lease income

Provide copies of assignment lease agreement and evidence of amounts received for the year ended 30 June 2016.

Did you receive any assignment lease income during the period 1 July 2015 to 30 June 2016? (mark with 'X') Yes No

If No, go to [Section 4](#)

If Yes, please provide the following details of the assignment lease income earned by you:

Note: Any assignment lease income after tax should be included in both Section 3.1 and Section 3.2.

| Licence number | Assignment lease income after tax for the financial year ended 30 June 2016 \$ |
|----------------|---|
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Section 4. Assets and liabilities

Section 4.1 Accounts in banks, building societies or credit unions

Provide a statement from your bank or financial institution showing the current account balance, within 2 months of application submission.

Note: Accounts and term deposits outside Australia as well as joint accounts should be included.

Do you and (if applicable) your partner have funds in savings accounts, cheque accounts or term deposits? (mark with 'X') Yes No

If No, go to [Section 4.2](#)

If Yes, please provide the following details (for both you and your partner):

| Name of bank, building society or credit union | Name of account holder(s) | Account number | Type of account | Balance of account at most recent statement date \$ |
|--|---------------------------|----------------|-----------------|---|
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Section 4.2 Real estate

Provide a copy of any mortgage (debt) statements and any evidence available regarding the current market value (e.g. council rates notice) and ownership of the asset as at the date of the application.

Note: Real estate includes owned occupied premises, vacant land, retail, industrial or commercial premises, house or townhouse, self-contained flat, unit or flats, farm and overseas property. If the property is a farm, include the value of livestock, plant and machinery in estimating market value.

Only describe one of the properties as your place of permanent residence.

Do you and (if applicable) your partner own any real estate? (mark with 'X') Yes No

If No, go to [Section 4.3](#)

If Yes, please provide the following details (for both you and your partner):

| Address | Real estate held (type e.g. apartment) | % owned | Primary residence (Y/N) | Estimated value at 30 June 2016 \$ | Mortgage owing at most recent statement date \$ |
|---------|--|---------|-------------------------|------------------------------------|---|
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Section 4.3 Licence debt

Provide a copy of any loan statements associated with your licence(s) for the most recent available date, and evidence of the interest and depreciation deductions claimed for the financial year ended 30 June 2016.

Where the licence(s) is held by an entity, please provide a copy of the entity's financial statements for the financial year ended 30 June 2016.

Note: Details should be limited to details of licence(s) that you and (if applicable) your partner have an ownership interest in. Where you only hold a portion of a licence(s), ensure that all amounts listed represent your portion rather than the full value.

Do you and (if applicable) your partner have a loan associated with a licence(s) at the date of this application? (mark with 'X') Yes No

If No, go to [Section 4.4](#)

If Yes, please provide the following details regarding the licence(s):

| Licence number | Value of your loan associated with licence(s) as at most recent statement date \$ | Loan repayments made from 1 July 2015 to 30 June 2016 \$ | Interest deductions claimed for the financial year ended 30 June 2016 \$ | Depreciation deductions claimed for the financial year ended 30 June 2016 \$ |
|----------------|---|--|--|--|
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Section 4.4 Shares and managed investment schemes

Provide a copy of any bank or holding statements as at 30 June 2016.

Do you and (if applicable) your partner own any interest in shares, options, rights, notes or other securities that are either listed on a stock exchange, or are issued by a private or public company that is not listed on a stock exchange? (mark with 'X') Yes No

If No, go to [Section 4.5](#)

If Yes, please provide the following details (for both you and your partner):

| Name of company | Type of share or security (i.e. ordinary, preference, redeemable) | Number of shares held in most recent month \$ | Estimated value at the end of the previous month \$ | % owned |
|-----------------|---|---|---|---------|
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Section 4.5 Superannuation (complete only if accessible)

Provide a copy of any superannuation account statements as at 30 June 2016.

Note: Superannuation outside Australia should be included. Please only include those amounts that have vested and are able to be accessed by the applicant or their partner at the date of this application.

Do you and (if applicable) your partner hold any superannuation fund accounts where amounts are currently accessible by the account holder? (mark with 'X') Yes No

If No, go to [Section 4.6](#)

If Yes, please provide the following details (for both you and your partner):

| Name of superannuation fund | Account number/ Membership number | Type of fund/assets held i.e. retail/industry | Balance of fund at 30 June 2016 \$ |
|-----------------------------|--------------------------------------|--|---------------------------------------|
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Section 4.6 Vehicles

Provide a copy of any loan statements and any evidence available regarding the current market value and ownership of the asset at most recent available statement date.

Note: Vehicles includes motor vehicles (e.g. taxi, family car), caravans, motor homes and boats.

Do you and (if applicable) your partner own, either wholly or jointly, any vehicles? (mark with 'X') Yes No

If No, go to [Section 4.7](#)

If Yes, please provide the following details (for both you and your partner):

| Make | Model/Year | Type e.g. taxi, family motor vehicle, boat | % owned | Estimated value at date of application \$ | Loan owing at most recent statement date \$ |
|------|------------|--|---------|---|---|
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Section 4.7 Other assets

Provide any relevant information available regarding other assets. This may include financial statements of entities, copies of any loan statements, invoices for the purchase of item and valuations obtained.

Note: Other assets may include, but are not limited to, cash on hand (where over \$5,000), interest in a business, shares in a private company or an interest in a family or unit trust. All assets outside of Australia should be included.

Do you and (if applicable) your partner have any other assets not indicated on this form? (mark with 'X') Yes No

If No, go to [Section 4.8](#)

If Yes, please provide the following details (for both you and your partner):

| Description of asset | % owned | Estimated value at date of application \$ | Amount owed (if financed) at most recent statement date \$ |
|----------------------|---------|---|--|
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Section 4.8 Other debts

Provide a copy of loan, credit card or credit facility statements showing the current account balance – must be within 2 months of application submission.

Note: Other debts may include, but are not limited to, personal loans, credit card debt and hire purchase agreements.

Do you and (if applicable) your partner have any other debts? (mark with 'X') Yes No

If No, go to [Section 4.9](#)

If Yes, please provide the following details (for both you and your partner):

| Type of debt | Account/ Reference Number | Owed to | Amount outstanding at most recent statement date \$ |
|--------------|---------------------------|---------|---|
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Section 4.9 Gifts and sale of assets

Have you and (if applicable) your partner gifted or sold any property or assets since 1 July 2014 of an amount greater than \$10,000?

Yes

No

(mark with 'X')

If No, go to [Section 4.10](#)

If Yes, please provide the following details (for both you and your partner):

| Date of gift/ asset sale | Item gifted/ sold | Estimated value of gift/ asset \$ | Sale price (if applicable) \$ |
|--------------------------|-------------------|-----------------------------------|-------------------------------|
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Section 4.10 Previous Tax Reform Hardship Fund payment

Did you and (if applicable) your partner receive a payment from the previous Tax Reform Hardship Fund? (mark with 'X')

Yes

No

Note: You are still able to apply for this fund if you received a payment from the previous fund.

Section 5. Statutory Declaration

I, _____
(full name)

of _____
(address)

_____, do solemnly and sincerely declare that the information provided by me in this Application for Access to the Fairness Fund is, to the best of my knowledge and belief, true, accurate and complete in every particular and that I have not knowingly omitted any information.

I acknowledge that by submitting this application, I consent for the Department of Economic Development, Jobs, Transport and Resources (DEDJTR) to distribute this application to the Taxi Services Commission to verify licence details as provided in this form.

I acknowledge that this declaration is true and correct, and I make it with the understanding and belief that a person who makes a false declaration is liable to the penalties of perjury.

Declared at _____ this _____ day of _____
(location) (day of month) (month, year)

Signature of person making this declaration [to be signed in front of an authorised witness]

Before me,

Signature of Authorised Witness

The Authorised Witness must print or stamp his or her name, address and title under section 107A of the *Evidence (Miscellaneous Provisions) Act 1958* (as of 1 January 2010), (previously *Evidence Act 1958*), (e.g. Justice of the Peace, Pharmacist, Police Officer, Court Registrar, Bank Manager, Medical Practitioner, Dentist).

Privacy and your personal information

DEDJTR is responsible for administering the Fairness Fund (Fund). Any personal or health information you provide as part of this application process will be treated in accordance with the *Privacy and Data Protection Act 2014* and *Health Records Act 2001*. DEDJTR will collect, use and disclose your personal information as part of the application process to determine whether or not you are eligible for a payment. As part of this process, your information (including but not limited to taxi and hire car licence ownership information held by the Taxi Services Commission) may be provided to an external auditing firm, an external taxation advisory firm, and the chair of the Fund. The external auditing firm, the chair of the Fund, or DEDJTR may contact you and seek your consent to contact banks or various other bodies in order to verify the accuracy of any information provided. To discuss any privacy concerns or request access or other changes to the personal information we hold about you, please contact the Fund by emailing fairnessfund@ecodev.vic.gov.au initially. DEDJTR's Website Privacy Statement is available on [DEDJTR's Privacy webpage](#). DEDJTR's Information Privacy Policy is available by emailing privacy@ecodev.vic.gov.au.

Please note: If you do not provide the information required by this form it may not be possible to process your application.

Supporting documentation and attachments

The paperclip symbol throughout this application indicated that you are required to attach supporting documentation for a particular section. To ensure we can process your application as quickly and accurately as possible, please make sure all required documents are attached and labelled with the **applicable section**. To help you track this, please fill in and check off the table below as you attach the documents to your application:

| Section / Reference | Type of document | Attached and labelled (mark with 'X') | |
|--|---|---------------------------------------|------------------------------|
| 3.1 Income | Your income tax return for the year ended 30 June 2016 | Y <input type="checkbox"/> | |
| | Your Notice of Assessment for the year ended 30 June 2016 | Y <input type="checkbox"/> | |
| | Your partner's tax return for the year ended 30 June 2016 | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Your partner's Notice of Assessment for the year ended 30 June 2016 | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | You and/or your partner's most recent 3 pay slips (if income has changed since 30 June 2016), and evidence for any other income | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 3.2 Assignment lease income | Assignment lease agreement | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Evidence of assignment amounts received for the year ended 30 June 2016 | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.1 Accounts | Bank statement for all accounts listed, must be dated within 2 months of application submission | Y <input type="checkbox"/> | |
| 4.2 Real Estate | Evidence of current market value | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Loan statement, must be dated within 2 months of application submission | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.3 Licence details | Loan statement, must be dated within 2 months of application submission | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Evidence of interest and deductions carried | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Financial statements for 30 June 2016 (if held by an entity) | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.4 Shares and managed investment schemes | Bank or holding statement | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.5 Superannuation | Superannuation account statement (only if you have access to the funds) | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.6 Vehicles | Evidence of current market value | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Loan statement, must be dated within 2 months of application submission | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.7 Other assets | Any relevant evidence | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 4.8 Other debts | Bank statement for all accounts listed, must be dated within 2 months of application submission | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| | Evidence for other debts listed | Y <input type="checkbox"/> | N/A <input type="checkbox"/> |
| 5 Statutory Declaration | Statutory Declaration – signed and dated by you and an authorised witness | Y <input type="checkbox"/> | |