

Private Health Insurance Statement 1 July 2007 to 30 June 2008



Mr Barry Smith
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Statement current at 17 June 2008

The figures below take into account premiums received and processed by MBF during the period 1 July 2007 to 30 June 2008.

Please note that occasional delays can occur between the time premiums are paid through a MBF agency, biller system or by salary deduction, and the time they are received and processed by MBF. If any payments are not included below, you have three options:

Option 1: You can wait until the next financial year and MBF will include these payments in your annual Private Health Insurance Statement for your 2008-2009 tax return.

Option 2: You may be able to request an updated statement from MBF. **Please note that we can only provide updated statements if we receive your request by 22 August 2008.** After this date, we are unable to make any adjustments for the 2007-2008 tax year.

Option 3: Refer to the relevant question in TaxPack 2008 or Retirees TaxPack 2008 for information on how to calculate your full entitlement.

T5/22/37 Federal Government 30 percent rebate on private health insurance and the higher rebates for older Australians

Maximum claimable rebate on private health insurance (after premium reductions) **\$0** **G**

If you received a cash or cheque payment from Medicare for health insurance premiums paid during the year, the tax offset you **may** be eligible to claim at item T5 (item 22 for retirees or item 37 for Short tax return) on your tax return is the amount shown at **G** less the cash or cheque payment from Medicare. If the amount at **G** is '0' you have already received your full entitlement.

The information used to calculate your maximum claimable rebate amount is listed below:

Total cost of policy	Total premiums received by the health fund from you or your employer	Premium reductions you have received from the Federal Government	Maximum rebate amount (before premium reductions)
\$2670	\$1869	\$801	\$801

Private health insurance policy details

Health fund ID	Membership number	Type of cover	Highest level of Rebate
B MBF	C 000 000 001	C	30%

M2/26/43 Medicare levy surcharge

If you and all of your dependants (including your spouse) did not have an **appropriate level** of private patient hospital cover for the full financial year (366 days) you may be liable for the **Medicare levy surcharge**. Refer to question **M2** in TaxPack 2008; question **26** in the Retirees TaxPack 2008 or question 43 in the Short tax return instructions 2008.

Maximum number of days this policy may provide an appropriate level of private patient hospital cover **A** 366

Number of days covered by General (Extras) cover (for your information only) 366

If you have any questions about this statement contact MBF on 131 137.

The labels on this statement correspond to the labels on your tax return.

If you have any questions about the Private Health Insurance rebate generally, contact the Tax Office on 13 28 61

KEEP THIS STATEMENT TO HELP YOU COMPLETE YOUR 2008 TAX RETURN

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