

Application for Home Purchase Assistance Scheme (HPAS) or Home Purchase or Sale Expenses Allowance (HPSEA)

• Refer: [PACMAN Volume 2, Chapter 6, Part 2](#)

Note: A separate form is required for each transaction.

Unit/CSC to forward completed application with covering minute to ADF Home Purchase & Prior Service at:

Navy BP33-1-89 Department of Defence PO Box 7927 CANBERRA BC ACT 2610	Army BP33-1-93 Department of Defence PO Box 7927 CANBERRA BC ACT 2610	Air Force BP33-1-89 Department of Defence PO Box 7927 CANBERRA BC ACT 2610
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This application is for *(Tick appropriate box)*

HPAS after 01 July 2000 *(Sections 1, 2 and 8)*

 HPSEA on sale *(Sections 1, 4, 6 and 7)*

 HPSEA on sale on termination of service *(Sections 1, 5, 6 and 7)*

 HPSEA second or subsequent purchase *(Sections 1, 3, 6 and 7)*

Have you or a dependant previously received or applied for HPAS or HPSEA *(Purchase or sale)*?

Yes No

↓

If 'Yes', give details of last reimbursement *(eg HPAS, HPSEA on purchase, HPSEA on sale or termination of service)*

Section 1 - Service details *(All fields are mandatory)*

Service	Employee ID	Service number	Rank
Family name		Given name(s)	
Losing unit or ship and locality of posting		Gaining unit or ship and locality of posting	
Posting WEF or march-in date	Posting authority date <i>(All applicants are to attach copy of posting order)</i>		

Present status *(Tick appropriate box)* *(Refer to [PACMAN Volume 1, Chapter 1](#))*

MWOD MWD MWD(U)

Date of marriage	Date of interdependent partnership

If separated for service reasons, state locality of family and approval date *(Attach approval)* *(PMKeyS print NOT sufficient)*

Locality:	Approval date:

Was your spouse a serving member at time of purchase?

Yes No

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If 'Yes', printed name	Rank	Employee ID	Service number	Unit or ship

Type of service

Full-time service Reserve full-time duty *(12 months or more)*

Date due for reappointment or reengagement or Open ended engagement

Have you submitted form AC 853 - *Application for Resignation, Discharge or Transfer to the Reserves* or been notified that you are to be discharged from the ADF?

Yes No

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If 'Yes', date application submitted or notified	Effective date of separation	Date due for retirement or discharge

Have you received official notification in writing of a further posting?

Yes No

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If 'Yes', unit or ship	WEF or march-in date	Posting authority date <i>(All applicants are to attach copy of posting order)</i>

If currently MWD, will you proceed on that posting unaccompanied and have you requested MWD(U) categorisation?

Yes No

Section 2 - Payment under Home Purchase Assistance Scheme (HPAS)

Details of land *(If purchased separately and home built on land)*

- A certified true copy of the signed and dated land contract is to be attached to this form.

Address *(Include state and postcode)*

Date entered into agreement (contract) to purchase

Date of settlement of purchase

Details of home

- A certified true copy of the signed and dated purchase or building contract is to be attached to this form.

Address *(Include state and postcode)*

Date entered into agreement (contract) to purchase

Date of settlement of purchase

Who owns the home and/or land?

Self

Self and dependants

Self and other

If 'Other', provide details

Expected date of occupancy of the residence *(If home has already been occupied, evidence of when it was occupied to be provided eg removal documents)*

Is the home within your posting location?

Yes

No

CO's approval to extend your posting location must be attached

Certification by applicant

I certify that the foregoing service, posting and other details in Section 1 are correct.

I am aware of the conditions under which the allowance is payable and undertake to advise my commanding officer, in writing, promptly if there is any change in circumstances that may affect my entitlement to HPAS.

I understand that, should I not proceed with the purchase or not occupy the home, I may be required to repay the amount of HPAS received.

I am aware that payment of HPAS is subject to income tax at time of payment and that the payment will be included on group certificates for taxation purposes. I have read and fully understand 'Section 8 - Tax implications'.

I am aware that I must occupy the residence being purchased on settlement of the purchase within the specific timeframe and that I must also be a member of the ADF at time of occupation.

Signature

Date

Day contact phone number

Email address

Certification by Commanding Officer, administration officer or manager

I certify that the service, posting and other details in Section 1 are correct.

I certify that the applicant has or had a further twelve months to serve in the locality at the time of entering into a written agreement (contract) to purchase *(Supporting documentation is attached as applicable)*.

I certify that the subject home in this application is within the applicant's locality of posting as defined in [PACMAN Volume 1, Chapter 1](#) definitions.

I confirm that each document included in support of this claim has been certified as a true copy.

Signature

Printed name

Rank

Appointment

Phone number

Unit address

Date

The following documentation is enclosed

Certified true copy of signed and dated contract Yes

Certified true copy of posting order or authority Yes

Evidence of occupancy Yes N/A

MWDU approval Yes N/A

Extension of posting locality approval Yes N/A

Note: If documentation required to establish eligibility is not provided, application will be returned.

Section 3 - Reimbursement of purchase costs (HPSEA)

Details of land *(If purchased separately and home built on land)*

- A certified true copy of the signed and dated land contract is to be attached to this form.

Address *(Include state and postcode)*

Date entered into agreement (contract) to purchase	Date of settlement of purchase
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Details of home

- A certified true copy of the signed and dated purchase contract is to be attached to this form.

Address *(Include state and postcode)*

Date entered into agreement (contract) to purchase	Date of settlement of purchase
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Who owns the home and/or land?

Self Self and dependants Self and other

If 'Other', provide details

Is the home within your posting location?

Yes No

CO's approval to extend your posting location must be attached

Date home occupied

Section 4 - Reimbursement of sale expenses (HPSEA)

Details of home

- A certified true copy of the signed and dated sale contract is to be attached to this form.

Address *(Include state and postcode)*

Date entered into agreement (contract) to sell	Date of settlement of sale
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Who owns the home and/or land?

Self Self and dependants Self and other

If 'Other', provide details

Were you or your family, if applicable, normally residing in the home on the date of notification of posting?

Yes No

If 'No', give reason

Section 5 - Reimbursement of sale expenses on termination of service (HPSEA)

Details of home

- A certified true copy of the signed and dated contract is to be attached to this form.

Address (Include state and postcode)	
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Date entered into agreement (contract) to sell	Date of settlement of sale
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Have you relocated to another locality on termination of service?

Yes No



If 'Yes', provide address and attach evidence that you have relocated to this address

Did you or your family, if applicable, normally reside in the home at time of discharge?

Yes No



If 'No', give reason

Details for forwarding payment (Payment will be automatically paid into the member's Direct Credit Account. However, if the member's Direct Credit Account is closed, a completed AD 576 - *Defence Employee Bank and Financial Institution Account Authorisation* is to be attached to this claim).

Section 6 - Certification and signature

Certification by applicant

I certify that the foregoing service, posting and other details are correct.

I am aware that data relating to payment of HPSEA in respect of a first purchase claim (Prior to 1 July 2000) will be used to determine the liability of the Department of Defence to payment of Fringe Benefits Tax, which will be noted on group certificates. I am aware that I must occupy the residence being purchased on settlement of the purchase and that I must also be a member of the ADF at time of occupation. I confirm that each document included in support of this claim is an original or has been certified as a true copy, as required.

Signature	Date	Day contact phone number	Email address
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Certification by commanding officer, administration officer or manager

I certify that the foregoing service, posting and other details in this application are correct.

I certify that the applicant has or had a further twelve months to serve in the locality at the time of entering into a written agreement (contract) to purchase (Supporting documentation is attached as applicable).

I certify that the subject home in this application is within the applicant's locality of posting as defined in [PACMAN Volume 1, Chapter 1](#) definitions.

I confirm that each document included in support of this claim is an original or has been certified as a true copy as required.

Signature	Printed name		
Rank	Appointment	Phone number	
Unit address	Date		

The member must provide all supporting documentation in accordance with Section 7 of this form.

Note: All expenses which are claimed for reimbursement under HPSEA are to be accompanied by an **original tax invoice** wherever there is a goods and services tax (GST) component (eg Solicitor's costs and disbursements, agent's commission and pre-purchase inspection fees). The tax invoices will be retained by the Department for five years. Where the original tax invoice has been lost, or is otherwise unavailable, a statutory declaration to this effect must be provided.

Section 7 - Checklist of supporting documentation (Tick appropriate boxes)

Note: If documentation required to establish eligibility is not provided, application will be returned

HPSEA purchase documents (House and land package)

- Original solicitor's or conveyancer's tax invoice and certified true copies of receipts.
- Original statutory declaration regarding stamp duty rebates.
(I have not received a stamp duty rebate).
- Original tax invoice and receipt for pre-purchase building and pest inspection.
- Certified true copy of posting orders or authority.
- Certified true copy of written agreement (contract) for purchase.
Must include date of contract and signature of vendor and/or buyer.
- Certified true copy of the final purchase settlement statement (Dated on or after settlement).
- Certified true copy of confirmation of settlement.
- Certified true copy of mortgage or loan contract details.
- Certified true copy of the lending authority's receipts for fees (eg bank statements).

Note: Where the solicitor or conveyancer was not engaged, attach an itemised statement, with original tax invoices and receipts, of costs incurred with the purchase.

HPSEA purchase documents (Land and house purchased separately)

- All documents as for house and land package above.
- Certified true copy of building contract signed and dated by builder and the member.
- Certified true copy of certificate of occupancy.

Note: HPSEA is not paid until the home is completed and occupied by the member and family (if applicable).

HPSEA sale documents

- Original solicitor's or conveyancer's tax invoice and certified true copies of receipts.
- Original real estate agent's tax invoice and certified true copies of receipts.
- Certified copy of posting orders or authority.
- Certified copy of written agreement (contract) for sale.
Must include date of the contract and signature of vendor and/or buyer.
- Certified copy of final sale settlement statement (Dated on or after settlement).
- Certified copy of confirmation of settlement.
- Certified copy of discharge of mortgage account and receipts (eg bank statements).

Note: Where the solicitor or conveyancer was not engaged, attach an itemised statement, with original tax invoices and receipts, of costs incurred with the sale.

Section 8 - HPAS tax implications

Payments under the HPAS are regarded as 'assessable income' and are therefore taxable at source. An amount of tax is deducted and remitted to the Australian Taxation Office by Defence through the salary pay-as-you-go system and the net-of-tax amount will be paid to you. The HPAS payment and the amount of tax installment deducted will appear on your group certificate (ie Your payment summary).

Being 'assessable income', the HPAS payment is included in a number of income tests relating to government benefits and obligations such as:

- Child support payments
- Higher Education Contributions Scheme (HECS) repayments
- Medicare levy surcharge
- Superannuation surcharge
- Termination payments surcharge
- Rebate for personal superannuation contributions

The payment will also be included in the income tests for the Family Tax Benefit, the Child Care Benefit and the parental income test for the Youth Allowance.

Before submitting your application for an HPAS payment, you are encouraged to check the implications of an HPAS payment on your personal affairs as outlined above.