

Tax File Number Notification via Fund Trustee

This form may be used to pass on your Tax File Number to your superannuation fund.

Your Surname/Family Name:

Given Name(s): Date of Birth:/...../.....

My Tax File Number:

Signature: Date:/...../.....

Collection of tax file numbers is authorised by tax laws, the Superannuation Industry (Supervision) Act 1993 and the Privacy Act as amended. Changes to the Tax File Number (TFN) law require Trustees to ask you to provide your TFN to your superannuation fund. By completing this form and providing it to your Fund, you will allow the Fund trustee to use your TFN for the purposes contained in the Superannuation Industry (Supervision) Act 1993 for paying termination payments and for contribution purposes.

The purposes currently authorised include:

- Taxing Termination Payments at concessional rates;
- Finding and amalgamating your superannuation benefits where insufficient information is available;
- Passing your TFN to the Australian Taxation Office where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age;
- Allowing the trustee of your superannuation fund to provide your TFN to another superannuation provider receiving any benefits you may transfer. Your trustee won't pass your TFN to any other provider if you tell the trustee in writing that you don't want them to pass it on;
- Allowing your superannuation provider to quote your TFN to the ATO when reporting details of contributions.

You are not required to provide your TFN. Declining to quote your TFN is not an offence. However, if you do not give your superannuation provider your TFN, either now or later:

- You may pay more tax on your superannuation benefits than you have to (you will get this back at the end of the financial year in your income tax assessment);
- It may be more difficult to find your superannuation benefits if you change address without notifying your fund or to amalgamate any multiple superannuation accounts; and
- Tax at a rate of 46.5% will apply to superannuation contributions made on your behalf by an employer (including salary sacrifice contributions) and any after-tax personal contributions you make will have to be rejected.

The lawful purposes for which your TFN can be used and the consequences of not quoting your TFN may change in future, as a result of legislative change.

For more information, please contact your Fund or the ATO Superannuation Helpline (13 10 20).