



For the member to complete and sign.

If your employer has already sent us your tax file number (TFN) you do not have to complete this form – check with your employer.

Plan details

Employer [] Plan reference []

Member details

Contact details

Mr Mrs Miss Ms Other please specify [] Surname (please print) [] Given name(s) [] Member reference [] Date of birth [/ /] Home telephone () [] Work telephone () []

I have read the information below and agree to provide my TFN: Yes No

Tax file number

[][][][][][][][][][]

X Member's signature [] Date [/ /]

Your tax file number is confidential. Before you provide your tax file number we are required to tell you the following:

- 1 Tax file numbers are collected under the Superannuation Industry (Supervision) Act 1993, Retirement Savings Accounts Act 1997, the Privacy Act 1988 and taxation acts (including the income tax act).
2 The Trustee and Fund Administrator will only use your tax file number for superannuation purposes, including:
- Finding or joining together your superannuation benefits.
- Calculating the correct tax on employment termination payments.
- Passing it to the trustee of another superannuation fund or provider of a retirement savings account when transferring your benefits.
- Passing it on to the Australian Taxation Office (ATO):
- if we have paid you a benefit
- to report contributions, or
- if you have unclaimed superannuation money after reaching the Aged Pension age.

These purposes may change in the future as a result of legislative changes.

What happens if I do not quote my TFN?

You are not obliged to provide your TFN to your superannuation fund. However, if you do not provide your TFN your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made into your account in the year, compared to the concessional tax rate of 15 per cent. Your fund may deduct additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account.

If you are an insurance only member and do not provide us with your TFN we will be unable to accept any contributions which will result in your insurance cover ceasing.

If you are a non-resident and you do not provide a TFN, the Trustee must withhold the prescribed rate of tax when paying a lump sum benefit. A tax exemption code is NOT recognised as a valid TFN.

Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

If you require further information please contact the ATO Superannuation Helpline on 131 020 or your financial planner.