

Tax File Number Notification Form



FREEDOM
OF CHOICE

Section 1: PERSONAL DETAILS

Surname:	<input type="text"/>	Salutation:	<input type="text"/>
Given Name(s):	<input type="text"/>	Date of Birth:	<input type="text"/>
Postal Address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
		Postcode:	<input type="text"/>
Telephone (BH):	<input type="text"/>	(AH):	<input type="text"/>
		Mobile:	<input type="text"/>
Email:	<input type="text"/>	Membership Number:	<input type="text"/>

Section 2: YOUR TAX FILE NUMBER (TFN)

I agree to provide my Tax File Number:

I do not agree to provide my Tax File Number

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, where your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- Your superannuation fund will be able to accept all types of contributions to your account/s;
- The tax on contributions to your superannuation account/s will not increase;
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing your superannuation benefits; and
- It will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Section 3: DECLARATION

I understand that:

- If I do provide my TFN, it will only be used for purposes approved by the law. This includes finding or identifying my superannuation benefits where other information is insufficient, calculating tax on any benefit I may be entitled to, for superannuation surcharge purposes and providing information to the Commissioner of Taxation. These purposes may change in the future.
- I am under no obligation to provide my TFN and declining to quote my TFN is not an offence.
- If I do not provide my TFN, I may pay more tax on my benefits than I have to and I also may have to pay the superannuation surcharge. It may also be more difficult to administer my benefit if you do not have my current address, if I wish to amalgamate my superannuation accounts, or if I have insufficient identification to claim or enquire about my benefits. These consequences may change in the future.
- If I provide my TFN, it will be passed on to the trustee of another superannuation fund to which my benefits are transferred or rolled over in the future, unless I indicate otherwise on this form. It may also be given to the Australian Taxation Office if required, for example if I have unclaimed monies.
- Freedom of Choice is authorised to collect my TFN under the Superannuation Industry (Supervision) Act 1993 and is governed by the Privacy Act.

Signature: Date: