

Tax File Number (TFN) Notification Form

PLEASE COMPLETE FORM IN BLOCK LETTERS IN BLACK INK

1. Important information for you

Superannuation funds are authorised to ask members for their TFN under the Superannuation Industry (Supervision) Act 1993 (often referred to as SIS). Legislation requires the Trustee to ask whether or not you want to provide your TFN to the Trustee. If you do provide your TFN to the Trustee, the Trustee will only use it for legal purposes.

The use of TFNs is currently authorised for the following purposes:

- passing your TFN to the Australian Taxation Office (ATO) so they can determine any surcharge tax that may be payable;
- taxing eligible termination payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient information is available;
- passing your TFN to the ATO where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age; and
- allowing the Trustee to provide your TFN to a superannuation fund or Retirement Savings Account (RSA) receiving any benefits you may transfer. The Trustee won't pass your TFN

to any other fund or RSA if you tell the Trustee in writing that you don't want your TFN to be passed on.

These purposes may be changed by future legislation.

Your TFN is confidential and providing it to the Trustee is optional, but if you do not provide your TFN to the Trustee either now or later:

- you may be liable for the surcharge tax (which may not have been the case if you had provided your TFN to the Trustee);
- you may pay more tax on your super benefit than you have to. If this happens you may be able to claim the extra tax back when you lodge your tax return; and
- it may be more difficult to locate or amalgamate your superannuation benefits in the future or for you to be paid any benefits to which you become entitled.

The consequences of not providing your TFN to the Trustee may also be changed by future legislation.

2. Your Accountants Super Membership Details

Your Accountants Super Member Number (if known)

Surname

Title

Date of birth

Given Name

Previous Surname (if different)

Street / Unit Number

Street Name

Suburb / Town

State

Postcode

Phone (Business Hours)

Phone (After Hours)

Mobile*

Fax

E-mail address* (Please **do not** leave any spaces empty, continue word on next line if necessary)

*Providing your mobile number/email address means you are willing to receive important information about your Accountants Super account and other benefits and services by SMS or email.

3. Providing your Tax File Number (optional)

My Tax File Number is

Accountants Super is authorised to collect your Tax File Number (TFN) under the Superannuation Industry (Supervision) Act 1993 and will use it only for superannuation purposes. These purposes may change in the future. Although it is optional to give us your TFN, there may be consequences if you do not. For example, you may pay more superannuation tax than you have to, although this may be reclaimed through the Australian Taxation Office (ATO). In addition, your TFN may be used in the future to assist in ensuring you do not lose track of your benefits. The consequences of not providing your TFN may change in the future. (Please note - it is not an offence if you do not provide your TFN). We may disclose your TFN to the ATO and to another superannuation fund at the time you transfer a benefit to that fund.

4. Privacy Statement

The information requested on this form is required in order to administer your membership. Your personal information may be provided to a financial adviser nominated by you and/or your employer. It may also be provided to specific organisations to provide services to you on our behalf. Your personal information will not be used or disclosed for any other purpose without your consent. If you do not provide the information requested, Accountants Super may not be able to administer your account. You may have access to the information Accountants Super holds about you. If you would like a copy of our Privacy Statement, please visit our website or call 1300 651 331.

5. Declaration

I hereby declare that to the best of my knowledge and belief, the information I have provided is true and correct.

Signed

Date

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6. Please return this form to:

Accountants Super
GPO Box 3607
Melbourne Vic 3001

For further information:

Phone: 1300 651 331
Fax: 1300 655 490
E-mail: asfinfo@accountants-super.com
Website: www.accountants-super.com

Professional Associations Superannuation Limited
(ABN 14 056 917 303 RSE L0000352) as Trustee of
Professional Associations Superannuation Fund (PASF)
(ABN 78 984 178 687 RSE R1000429).
Accountants Super is a division of PASF.