



Tax File Number Notification Form

Please read the section below, sign and return to
PO Box 666 **CARLTON SOUTH** Vic 3053

First Super Pty Ltd ABN 42 053 498 472 ~ AFSL No. L223988

Member No. _____

Full Name _____ Birthdate _____

We are required to give you the following information before you provide your Tax File Number (TFN) to the Trustee of your superannuation fund or scheme. Your TFN is confidential, and you should know the following things before you decide to provide it :

The provision and receipt of your TFN is authorised under the Superannuation Industry (Supervision) Act 1993. We are required by law to properly safeguard your TFN and only use it for legal purposes including:

- advising the Commissioner of Taxation for taxation purposes;
- calculating tax on an Eligible Termination Payment you may be entitled to;
- assisting the search for and amalgamating superannuation benefits where other data is insufficient;
- advising the Commissioner of Taxation of any unclaimed monies; and
- advising the ATO if no contributions have been received for a period of two years and your fund fund is unable to confirm your address. In these circumstances you are assumed to be a lost member.

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

Providing your TFN is voluntary and it is not an offence if you do not provide it. However, if you choose NOT to provide your TFN the consequences are :

- tax may be taken out of benefits paid to you at the highest marginal rate (currently 47%), plus the Medicare levy (this may be recovered after lodgement of your tax return);
- superannuation surcharge may be payable on taxable contributions paid by or for you after 20 August 1996 (which may not have been payable if you had provided your TFN). This is in addition to the 15% tax currently applicable on taxable superannuation contributions; and
- in future it may be more difficult to locate, identify or amalgamate multiple benefits you haven't claimed.

If you provide your TFN it may be disclosed :

- to the trustee of another superannuation fund or RSA provider if your benefits are transferred or rolled over in the future, unless you tell us in writing that you don't want us to do that
- to the Commissioner of Taxation

Otherwise your TFN will be treated as confidential.

More information on Tax File Numbers for superannuation purposes can be obtained from the Australian Prudential Regulation Authority.

I AGREE TO PROVIDE MY TAX FILE NUMBER : YES NO (please tick one)

MY TAX FILE NUMBER IS : _____ / _____ / _____

By signing below I acknowledge that I have read and understood the statements in this form and I authorise the Trustees to use my TFN (if provided) for the purposes advised to me above.

SIGNED : _____ DATE _____