

Tax file number collection

Use this form if you want to provide your tax file number (TFN) to First State Super.

If you are under age 60 and hold a First State Super income stream, you should provide your TFN on a *Tax file number declaration* form, available from the Australian Taxation Office or from customer service.

Please use a dark pen and CAPITAL letters, or type directly into this form online, print it and send it to us. Use (X) to mark boxes. Forms are located on our website at firststatesuper.com.au/forms

If you have any questions, please call us on 1300 650 873.

1. Your personal details

Member number	Account number	Date of birth (DD-MM-YYYY)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Last name		
<input type="text"/>	<input type="text"/>		
Given name(s)			
<input type="text"/>			
Residential address			
<input type="text"/>			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Postal address (if different from residential)			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Daytime contact number	Mobile number		
<input type="text"/>	<input type="text"/>		
Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as <code>employee_title@company.com.au</code>)			
<input type="text"/>			

i See Notes on page 2 for important information about providing your TFN.

2. Tax file number

<input type="text"/>	<input type="text"/>	<input type="text"/>
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3. Privacy

The personal information provided on this form is collected by and held for First State Super by the fund administrator, Mercer Administration, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on 1300 650 873 or visit firststatesuper.com.au/privacy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.




4. Declaration

I consent to providing my TFN for the legal purposes stated below:


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 the Commissioner of Taxation or another superannuation provider, when 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 trustee or the Australian Taxation Office.

I have read and understand the First State Super privacy policy.

 Please sign and date form here.

Signature

Date signed (DD-MM-YYYY)

 Send the form to this address.

5. Where to send your completed form

Return the completed form to **First State Super PO Box 1229 WOLLONGONG NSW 2500**. If you have any questions, please call us on **1300 650 873**.

Notes

You are not legally required to provide us with your TFN, but if you have not provided it:

- we cannot accept any personal or other after-tax contributions to your account; we must return these contributions and they will not be invested nor earn interest;
- we can accept employer and salary sacrifice contributions, but they may be subject to no-TFN additional tax;
- you may pay additional tax on your benefit when it becomes payable; and
- any no-TFN additional tax liability will take priority over your insurance premiums and your insurance may cease if your account balance is not sufficient to pay both your insurance premiums and the additional tax.

Refer to the *Super taxes, caps, payments, thresholds and rebates* fact sheet on our website for the latest tax rates, caps, thresholds and rebates.

How is the no-TFN additional tax paid?

The additional tax will be payable at the end of the financial year or the date that you withdraw your benefit, whichever occurs first. The tax is payable if we do not have your TFN at that time and it will generally be deducted from your account at 30 June (or when you withdraw your benefit). Special rules apply if you were a member of First State Super on 30 June 2007 and your employer and salary sacrifice contributions for a financial year are less than \$1,000.

If you are paid a benefit as either a lump sum or an income stream, or you split your account or contributions with your spouse and we do not have your TFN, then tax will be deducted at the time of payment.

Refund of tax if TFN is subsequently provided

If you or your employer subsequently provide your TFN, you may be entitled to a refund of the tax. Generally, the refund can only be claimed if you supply your TFN within three years of the tax being deducted from your account.

If you qualify for a refund, we will automatically process it if the contributions are held in the same account. If you have merged or transferred benefits between accounts in First State Super or started an income stream with the contributions, you will need to contact us to request the refund. The refund cannot be credited to an income stream account.

What can we do with your TFN?

Under the *Superannuation Industry (Supervision) Act 1993*, the fund is authorised to collect your TFN, which we will only use for lawful purposes in the administration of your superannuation benefit. These purposes may change in the future as a result of legislative change.

We may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other superannuation provider. We may also disclose your TFN to our administrator and the Commissioner of Taxation in order to provide all of the services required in the administration of your account.

We may also use your TFN to identify multiple accounts within the fund and consolidate them when permitted under law. It is not an offence not to advise us of your TFN, however, there are advantages in doing so:

- the fund will be able to accept all types of contributions to your account including superannuation guarantee contributions, other before-tax contributions, and after-tax contributions
- the tax on contributions to your account will not be increased as a consequence of not providing your TFN
- no additional tax (that is, beyond that which ordinarily may apply) will be deducted when you start drawing down on your superannuation benefits
- it will make it easier to trace different superannuation accounts in your name and match your accounts in the fund so you receive all of your superannuation benefits when you retire.