Inactive low-balance account authorisation

first state super

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

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

You should use this form if you have an inactive low-balance account and you would like to authorise us to send the Australian Tax Office (ATO) a written notice on your behalf (a 'declaration') that this account is active and you would like it to remain with First State Super. Please complete a separate authorisation for each inactive low-balance account you would like to declare active. Your declaration lasts for 16 months.

An inactive low-balance account:

- is under $6,000
- has no insurance attached to it
- has not – for a period of 16 months – received contributions, had a change to investment options or insurance cover, or been subject to a new or changed binding beneficiary nomination.

See **Important information you need to know** on page 2.

1. Your personal details

Member number

Account number F S S U

Date of birth (DD-MM-YYYY)

Title

Last name

Given name(s)

Residential address

Suburb

State

Postcode

Postal address (if different from residential)

Suburb

State

Postcode

Daytime contact number

Mobile number

Your preferred contact number MUST be provided so we can contact you if we need more information.

Tax file number (if not previously provided)

It is not compulsory to provide your TFN but if you don't, there may be a delay processing this form.

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 employee_title@company.com.au)

2. Superannuation account details

Fund name F I R S T S T A T E S U P E R

Unique superannuation identifier (USI) 53 226 460 365 001

Fund ABN 53 226 460 365

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.

Make sure you have completed all sections correctly before you sign and date this form. An incomplete form may delay the processing of your request.

4. Authorisation

I authorise First State Super to act on my behalf and to give the ATO a written notice declaring that I am not a member of an inactive low-balance account[1].

I declare that all information provided on this form is complete and correct.

[1] As defined in subparagraph 20QA(1A)(b)(iv) of the Superannuation (Unclaimed Money and Lost Members) Act 1999.

Please sign and date form here and print your name.

Signature

Date signed (DD-MM-YYYY)

Name (print in CAPITAL letters)

Send the form to this address.

5. Where to send your completed form

We require **original** copies of this form. Please post the completed form to **First State Super PO Box 1229 WOLLONGONG NSW 2500**.

Save form | Print form | Clear form

Important information you need to know

You should complete this form if you have an inactive low-balance account and you want to keep this account with First State Super. If you don't complete this form or you don't take one of the other actions to activate your account (make a contribution, change your investment option or insurance, make or change a binding beneficiary nomination) your account will be transferred to the Australian Tax Office. The ATO will try to merge this account with an active super account in your name, if you have one.

Once we receive this form, we will provide a written declaration to ATO on your behalf that you are not a member of an inactive low-balance account and your account will remain with us. It will continue to be subject to fees and charges.

We identify inactive accounts on 30 June and 31 December each year. If your account is inactive, we will contact you shortly after these dates to find out what you would like us to do with your account. If you want to keep your account with us, you will need to let us know by **30 September** and **30 March** so we have enough time to process your *Inactive low-balance account authorisation* and send a declaration to the ATO on your behalf.

The declaration we send on your behalf will be valid for 16 months from the date the ATO receives it. Upon expiry, if your account continues to be an inactive low-balance account, you will need to again take one of the actions outlined above.

Visit ASIC MoneySmart website for more information or consult your financial adviser if you would like advice on how to manage your super.