

TAX FILE NUMBER (TFN) NOTIFICATION FORM



Please complete this form in BLOCK letters using a blue or black pen. Print an 'X' to mark boxes where applicable.

YOUR PERSONAL DETAILS

Energy Super member number (if known):

Surname:

Title: Mr Mrs Ms Miss Dr

Given names:

Date of birth: (DD/MM/YYYY) / /

Residential address:

State: Postcode:

Postal address (if same as above, write "as above"):

State: Postcode:

Telephone (home):

Telephone (work):

Mobile:

Primary email:

Secondary email:

YOUR TAX FILE NUMBER

I agree to provide my TFN for the purpose outlined in the *How Super Works Guide*:
Yes No

I consent to allow the Fund to:

- (a) use my TFN to search the Australian Taxation Office's (ATO) SuperMatch service for any super I may have;
- (b) transfer any super-related monies held by the ATO to my Energy Super account and to notify me; and
- (c) advise me of any other super found and give me the opportunity to transfer it into my Energy Super account.

This consent is ongoing until I revoke it with the Fund in writing or by calling **1300 436 374**. For further information on the collection and use of TFNs please refer to the *How Super Works Guide* available at **energysuper.com.au**

Yes No

I advise that my TFN is: - -

DECLARATION

- I confirm that I have read the information on Tax File Number notification and privacy (see over the page)
- I understand that the personal information I have provided on this form will be used for the purposes of administering my Energy Super account (and in particular claiming an appropriate tax deduction under tax legislation).

Member's signature:

Date: (DD/MM/YYYY) / /

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TAX FILE NUMBER NOTIFICATION

The Fund is authorised to collect your Tax File Number (TFN) by tax laws, the Superannuation Industry (Supervision) Act 1993, the Privacy Act 1988 and subsequent amendments.

By completing this form and providing it to the Fund, you will allow the Fund's Trustee to use your TFN for:

- Calculating tax on any benefit to which you may be entitled
- Provision to the ATO for taxation and contribution limit purposes
- Provision to the ATO so they can determine whether you are eligible for a co-contribution payment
- Finding and amalgamating your superannuation benefits
- Provision to the ATO when you receive a benefit or have unclaimed superannuation money after reaching the aged pension age
- Provision to another superannuation provider receiving benefits you may transfer (We won't pass your TFN to any other superannuation provider if you tell us in writing that you don't want us to pass it on).

Supplying your TFN is voluntary and it is not an offence if you choose not to provide it.

However, if you choose not to provide your TFN to the Fund:

- We will not be able to accept any after-tax contributions (including spouse contributions) on your behalf
- Your taxable contributions received by us may be subject to additional tax of 34% (this is in addition to the 15% tax currently applicable to superannuation contributions)
- You may pay more tax on your superannuation benefit than is necessary (you may be eligible to get this back at the end of the financial year in your income tax assessment)
- It may be more difficult to find your superannuation benefit if you change address without notifying the Fund or to amalgamate any multiple superannuation accounts you may have
- You cannot receive the Government Co-contribution.

The lawful purposes for which your TFN can be used and the consequences of not quoting your TFN may change in the future as a result of legislative change.

More information on Tax File Numbers for superannuation purposes can be obtained from the Australian Prudential Regulation Authority on 1300 131 060 or the Australian Taxation Office on 13 10 20.

PRIVACY STATEMENT - YOUR PRIVACY IS IMPORTANT TO US

LGIAsuper (the issuer of the Energy Super product) respects your privacy. All personal information collected via this form is protected in line with LGIAsuper's Privacy policy. To find out more about how we collect and manage your personal information, please refer to our privacy policy available at energysuper.com.au.

RETURN THIS FORM

Energy Super

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F 07 3229 7523

E member@energysuper.com.au
(as a scanned email attachment)

TALK TO US

T 1300 436 374

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