

Tax File Number form

Connelly Temple Super Savings Plan



Asteron Portfolio Services Limited ABN 61 063 427 958 AFS Licence No 237905
Level 23 2 Market Street Sydney NSW 2000
Telephone 1300 361 755

Collection of tax file numbers is authorised by tax laws, the Superannuation Industry (Supervision) Act 1993 and the Privacy Act 1988. The tax file number law requires trustees to ask you to provide your tax file number to your superannuation fund. By completing this form and providing it to your fund you will allow your fund trustee to use your tax file number for the purposes contained in the Superannuation Industry (Supervision) Act 1993 and when paying eligible termination payments.

The purposes currently authorised include:

- taxing eligible termination payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient information is available;
- passing your tax file number to the Australian Taxation Office and, unless you instruct the trustee in writing not to do so, allowing the trustee of your superannuation fund to provide your tax file number to the trustee of a superannuation entity or retirement savings account provider receiving any benefits you may transfer. Otherwise, your tax file number will be treated as confidential; and
- allowing your superannuation provider to quote your Tax File Number to the Australian Taxation Office when reporting details of contributions for the purposes of the Superannuation Contributions Tax (Surcharge).

You are not required to provide your tax file number. Declining to quote your tax file number is not an offence. However, if you do not give your superannuation fund your tax file number, either now or later:

- you may pay more tax on your superannuation benefits than you have to (you may be able to claim this back at the end of the financial year in your income tax assessment);
- it may be more difficult to find your superannuation benefits if you change address without notifying your fund or to amalgamate any multiple superannuation accounts; and
- the surcharge may apply to superannuation contributions made by you or on your behalf.

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

For more information, please contact Asteron Client Services on Freecall 1300 361 755. Alternatively you can contact the Australian Taxation Office Superannuation Helpline on 13 10 20.

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Miss <input type="checkbox"/>	Dr <input type="checkbox"/>	Other <input type="text"/>
Name	Surname/Family Name <input type="text"/>					
	Given Names <input type="text"/>					
Postal Address	<input type="text"/>					
					State	Postcode
Phone	Home (<input type="text"/>) <input type="text"/>			Business (<input type="text"/>) <input type="text"/>		
	Mobile <input type="text"/>			E-mail <input type="text"/>		
Date of Birth	Day <input type="text"/>	<input type="text"/>	Month <input type="text"/>	<input type="text"/>	Year <input type="text"/>	<input type="text"/>
	Sex: Male <input type="checkbox"/>		Female <input type="checkbox"/>			

I agree to provide my Tax File Number to the Trustee of the Connelly Temple Super Savings Plan

<input type="checkbox"/> Y	<input type="checkbox"/> N
(please circle)	

My Tax File Number

Provision of your tax file number is extremely confidential. To ensure that your privacy is maintained please forward the completed form directly to:

Connelly Temple Super Savings Plan
GPO Box 1576 Sydney NSW 2001