

ANZ ONEANSWER PERSONAL SUPER TAX FILE NUMBER NOTIFICATION FORM



1 February 2020

Customer Services

Phone 13 38 63

Email customer@onepath.com.au

Website anz.com

This form is for existing investors in ANZ OneAnswer Personal Super – Entry Fee, Deferred Entry Fee, Nil Entry Fee and //Select.

INSTRUCTIONS

- This form should be completed to provide your tax file number.
- Please complete the relevant section of this form and forward to:
ANZ OneAnswer
GPO Box 4028
Sydney NSW 2001

1. MEMBER NUMBER

Member number

2. MEMBER DETAILS

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s) (including middle name)

Date of birth

Address

Suburb/Town State Postcode

Contact Phone

TFN number

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3. PROVIDING YOUR TAX FILE NUMBER (TFN)

Your TFN is confidential, and you should know the following before you decide to provide it to OnePath Custodians or a third party engaged by either OnePath Custodians or a related party of OnePath Custodians to provide superannuation administration services ("third party administrator") relating to this product:

- OnePath Custodians and the third party administrator are authorised to collect your TFN under the Taxation and Superannuation Laws.
- If you do provide your TFN to OnePath Custodians or the third party administrator, they will only use it for legal purposes. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation benefit payments you may be entitled to.
- If you do provide your TFN to OnePath Custodians or the third party administrator, they may provide it to the trustee of another superannuation fund or a Retirement Savings Account (RSA) provider where the trustee or RSA provider is to receive your transferred benefits in the future.
- OnePath Custodians and the third party administrator will not pass your TFN to any other superannuation fund if you tell OnePath Custodians or the third party administrator in writing that you do not want them to pass it on.
- OnePath Custodians or the third party administrator may quote your TFN to the Australian Taxation Office (ATO) when reporting details of contributions for the purpose of lost member reporting, monitoring contributions caps and administration of the government co-contribution and low income superannuation contribution.

Otherwise your TFN will be treated as confidential. You are not required to provide your TFN. Declining to quote your TFN is not an offence.

However, if you do not give OnePath Custodians or the third party administrator your TFN, either now or later:

- They may not be able to accept personal contributions.
- Additional taxes will apply to concessional contributions (including compulsory employer contributions).
- You may pay more tax on your superannuation benefits when you withdraw them than you have to (you may get this back at the end of the financial year in your income tax assessment).
- It may be difficult to locate or amalgamate your superannuation benefits in the future.

The purposes for which OnePath Custodians or the third party administrator can use your TFN and the consequences of not providing it to them may change in the future as a result of changes to the law.

By signing this form:

- I consent to the collection, use, storage and disclosure of my personal information (including health and other sensitive information) as described in ANZ's Privacy Policy which is available at anz.com/privacy and OnePath Custodians' Privacy Policy which is available at onepath.com.au/superandinvestments/privacy-policy. If I have provided information about another person in this application (for example a beneficiary or life insured), I declare that I have the consent of that person to do so. I understand that ANZ and OnePath Custodians require me to inform the person concerned that I have done so and direct them to the relevant Privacy Policies so they may understand the manner in which their personal information (including health and other sensitive information) may be used and disclosed by ANZ and OnePath Custodians.
- I consent to OnePath Custodians, any third party engaged by OnePath Custodians or any third party engaged by a related party of OnePath Custodians to provide administration services relating to this product, using and sharing my Tax File Number with authorised recipients and approved recipients to provide services (including account consolidation) and products to me.

Name of member

Signature of member

Date

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