

ANZ SMART CHOICE SUPER

NOTICE OF INTENT TO CLAIM OR VARY A DEDUCTION FOR PERSONAL SUPER CONTRIBUTIONS



1 February 2020

Customer Services

Phone 13 12 87

Email anzsmartchoice@anz.com

Website anz.com/smartchoice

Complete and sign the form if you intend to claim or vary a deduction for personal contributions and return to:

ANZ Smart Choice Super
GPO Box 5107
Sydney NSW 2001

1. MEMBER ACCOUNT NUMBER

Member number

2. MEMBER DETAILS

Date of birth

First name(s) Last name

Residential address

Suburb/Town State Postcode

Home phone Business phone

Mobile phone

3. CONTRIBUTION DETAILS

You must complete and return this notice to ANZ if you intend to claim a taxation deduction for part or all of your personal superannuation contributions.

Financial year ended 30 June

My personal contributions to this Fund in the above financial year:

\$

The amount of these personal contributions I will be claiming as a tax deduction:

\$

Is this notice varying an earlier notice Yes No

Please note: A tax deduction for personal superannuation contributions may only be claimed by people in certain circumstances. Please refer to the Australian Taxation Office (ATO) or your tax adviser to determine if you are eligible to claim a personal tax deduction.

Unique Superannuation Identifier (USI):

ANZ Smart Choice Super – MMF2076AU

4. DECLARATIONS

In signing one of the declarations on this form, you should be aware that the law has changed to expand the administrative penalty provisions to include penalties for making false or misleading statements that do not result in a shortfall amount.

This may include making false or misleading statements to an entity other than the ATO if the statement is required or allowed to be made under tax law, for example, a notice of intent to deduct super contributions given to a super fund.

For more information about these penalties, refer to "Superannuation and false or misleading statements which do not result in a shortfall amount" at ato.gov.au

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4A. DECLARATION

Intention to claim a tax deduction

Use this declaration if you have not previously lodged a notice with the Fund for these contributions.

I am lodging this notice before both of the following dates:

- the day that I lodged my income tax return for the year stated in section 3, and
- the end of the financial year after the year stated in section 3.

At the time of completing this notice:

- I intend to claim the personal contributions in section 3 above as a tax deduction.
- I am a member of Retirement Portfolio Service.
- Retirement Portfolio Service currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.
- I have not included these contributions in an earlier valid notice.
- This form is taken to include details previously provided (including my tax file number).

The information given on this form is correct and complete.

Name of member

Signature of member

Date

or

4B. DECLARATION

Variation of previous valid deduction notice

Use this declaration if you have already lodged a valid notice with the Fund for these contributions and you wish to reduce the amount stated in that notice.

I confirm that:

- I intend to claim the personal contributions in section 3 above as a tax deduction.
- I am a member of Retirement Portfolio Service.
- Retirement Portfolio Service currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.
- I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice.

I confirm that either:

- I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following financial year and this variation notice is being lodged before the end of the day on which the return was lodged, or
- I have not yet lodged my income tax return for the relevant financial year and this variation notice is being lodged on or before the 30 June in the financial year following the year the contribution was made, or
- the Australian Tax Office has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

The information given on this form is correct and complete.

Name of member

Signature of member

Date