

Tax file number notification

You can use this form to notify the trustee of your tax file number (TFN).

Important information

If you have any questions,
please call us on **1300 614 644** or email
enquiry@smartmonday.com.au

For more information go to our website
smartmonday.com.au

Legislation requires the trustee to ask whether or not you want to provide your TFN to the trustee. If you do provide your TFN, it will only be used for legal purposes. The purposes currently authorised for the use of TFNs include:

- taxing your superannuation contributions, employment termination payments and superannuation benefits at concessional rates
- finding and amalgamating your superannuation benefits within the Fund
- passing your TFN to the Australian Taxation Office (ATO):
 - ▢ where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age
 - ▢ to allow them to determine your eligibility for superannuation co-contributions
 - ▢ if your consent is provided, to seek superannuation information to locate your accounts and facilitate the consolidation of multiple superannuation funds
- allowing an employer to treat a TFN quoted for employment purposes as being quoted for superannuation purposes
- if your consent is provided, contacting another superannuation entity to seek information to locate other superannuation accounts you may have, and facilitate the consolidation of those accounts into your smartMonday account.

These purposes may be changed by future legislation.

Your TFN is confidential and you do not have to provide it to the trustee. If you do not provide your TFN to the trustee:

- you will not be allowed to make non-concessional contributions to your super
- you may pay extra tax on concessional contributions (the extra tax is refundable if you provide your TFN within four years)
- you may pay extra tax on your super benefit (you may be able to claim the extra tax back when you lodge your tax return)
- it may be more difficult to find or amalgamate your superannuation benefits in the future.

The consequences of not providing your TFN to the trustee may also be changed by future legislation.

Your details

Member number (if known)

Given names

Surname

Date of birth (DD/MM/YYYY)

Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001



Your details

Phone (mobile)

Email

Postal address

Suburb

State

Postcode

Your tax file number

Your TFN will be provided to any new fund to which you may later transfer, unless you advise us otherwise.

Tax file number

Signature

Date

Privacy

The fund is subject to the trustee's privacy statement, which is available at eqt.com.au/global/privacystatement

Your declaration and authorisation

I understand that I do not have to provide my TFN. I am choosing to provide my TFN to the trustee:

- so that my non-concessional contributions can be accepted by the Fund
- so that any subsequent contributions and benefit payments may be taxed at concessional rates
- to facilitate the administration of my superannuation account
- to facilitate the search for and consolidation of my superannuation accounts, by seeking superannuation information from the Australian Taxation Office (ATO) or another superannuation entity, as legislation allows
- to facilitate any other actual or proposed uses authorised by superannuation or taxation legislation.

I declare that I have read the the privacy statement and consent to my personal information being handled in accordance with that statement.

Signature

Date (DD/MM/YYYY)