

Notice of intent to claim a tax deduction

You can use this form to claim a tax deduction for personal superannuation contributions you made to the Fund in 2016/17 while self-employed or substantially self-employed. You can also use this form to change a previous claim for a deduction for personal contributions. Note: from 1 July 2017, everyone is able to make tax-deductible contributions.

Important information

If you have any questions, please call us on **1300 880 588** or email enquiries@smartMonday.com.au

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

Claiming a tax deduction

- When deciding whether to claim a tax deduction for super contributions, you should consider whether you will exceed your concessional contribution caps. Contributions for which you claim a tax deduction will count toward your annual cap. You should also consider whether it will affect your eligibility for the Government's super co-contribution. For more information, see the [Contributions](#) page on our website. The Australian Tax Office (ATO) website ato.gov.au is also very useful on these subjects.
- You must be a current member of the Fund.
- If you withdraw or transfer a part of your super account balance it may reduce the amount you can claim as a tax deduction. If you had made withdrawals during the year, you may wish to seek advice on determining the correct amount to claim as a tax deduction. The ATO website provides guidance on this subject.
- You can only make one claim per financial year for tax deductions for personal contributions and you must make your claim before you file your tax return for that year.
- You can only claim a deduction once the Fund has acknowledged your *Notice of intent to claim a tax deduction* in writing.

Changing a previous notice to claim a tax deduction

- You can use this form to reduce an amount claimed as a tax deduction only if you have submitted a previous *Notice of intent to claim a tax deduction* form to the Fund for that same period.
- You cannot increase the amount you have claimed as a tax deduction in the Fund.
- You can reduce the amount you have claimed previously as a tax deduction **only** if you have not lodged your tax return for the relevant financial year **or** if the ATO has disallowed a previous claim you have made.

Please select the appropriate option.

- I wish to claim a tax deduction for personal contributions made to the Fund — over the page complete *Your details, Your contribution details* and *Your declaration to claim a tax deduction*.
- I wish to change a previous *Notice of intent to claim a tax deduction* — over the page complete *Your details, Your contribution details* and *Your declaration to change a previous claim*.

Your options

Send your completed form to: smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).

smartMonday is the business name of the Aon Master Trust ABN 68 964 712 340 (the Fund) which has been registered by Aon Hewitt Limited ABN 48 002 288 646 AFSL 236667 as sponsor of the Fund. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

Your details

Member number (if known)

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

Your contribution details

Financial year ended 30 June (YYYY)

My total personal contributions* for the financial year

\$

(complete amount)

Amount of these contributions that I will be claiming as a tax deduction

\$

(complete amount)

* See the [Contributions](#) page on our website for contribution cap amounts.

Your declaration 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 above and
- > the end of the financial year following the year stated above.

Intention to claim a tax deduction

I confirm that, at the date of lodging this notice:

- > I am a member of the Fund stated above
- > The Fund still holds the personal contributions for which I am claiming a tax deduction
- > I have not lodged my income tax return for the financial year stated in *Your contribution details*
- > I intend to claim the personal contributions stated in *Your contribution details* as a tax deduction
- > the trustee has not begun to pay an income stream that has been purchased using the contributions for which I am claiming a tax deduction
- > I have not included these contributions in a previous *Notice of intent to claim a tax deduction*, and
- > the information given in this form is true and correct.

Signature

Date (DD/MM/YYYY)

Your declaration to change a previous claim

Use this declaration if you are changing a previous *Notice of intent to claim a tax deduction* that you have lodged with the Fund.

I confirm that, at the date of lodging this notice:

- I wish to change my previous notice for these contributions by reducing the amount I advised in that notice
- I intend claiming a tax deduction for the personal contributions stated in *Your contribution details*
- I have not lodged my tax return for the relevant financial year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the contributions were made **OR** the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed, and
- the information given in this form is true and accurate.

Signature

Date (DD/MM/YYYY)