

Tax file number notification

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

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

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 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 a Retirement Savings Account (RSA) provider or superannuation entity to seek superannuation information to locate your accounts and facilitate the consolidation of multiple superannuation funds.

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 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)

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

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.

Telephone

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

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

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) and/or a RSA provider or 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 [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#), and consent to my personal (including sensitive) information being handled in accordance with these policies.

Signature

Date (DD/MM/YYYY)