legalsuper

Notice of intent to claim or vary a deduction for personal super contributions

WHEN COMPLETING THIS STATEMENT

- Print clearly in BLOCK LETTERS using a black pen only.
- Use BLOCK LETTERS and print one character per box.

S M I T H S T

- Place X in ALL applicable boxes.

The instructions contain important information about completing this notice. Please refer to them for more information about how to complete and lodge this notice.

Section A: **Your details**

1 Tax file number (TFN)

You don't have to provide your TFN to your super fund. However, if your fund does not have your TFN, they may not be able to accept your contributions. Providing your TFN will also assist your fund in correctly identifying you.

2 Name

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family name

First given name

Other given names

3 Date of birth Day / Month / Year

4 Current postal address

Suburb/town/locality

State/territory (Australia only)

Postcode (Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

Section B: **Super fund's details**

6 Fund name

L E G A L S U P E R P T Y L T D

7 Fund Australian business number (ABN) 37 004 455 789

8 Member account number

Section C: **Contribution details**

9 Personal contribution details

Financial year ended 30 June 20

My personal contributions to this fund covered by this notice $

Is this notice varying an earlier notice? No ☐ Yes ☐

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

Section D: **Declaration**

Complete and sign one of the following statements that applies to you

INTENTION TO CLAIM A TAX DEDUCTION

Use this declaration if you have **not** previously lodged a notice with your super 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 C, and*
- *the end of the income year after the year stated in section C.*

At the time of completing this notice:

- *I intend to claim the personal contributions stated in section C as a tax deduction.*
- *I am a member of the super fund stated in section C*
- *my super fund stated in section B still holds these contributions*
- *this super fund has not begun to pay a superannuation income steam based in whole or part on these contributions,*
- *I have not included these contributions in an earlier notice*

The information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

Day / Month / Year

OR

VARIATION OF PREVIOUS DEDUCTION NOTICE

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

I intend to claim the personal contributions stated in section C as a tax deduction.

*I wish to vary my previous notice for these contributions by **reducing** the amount I advised in my previous notice.*

I confirm that either:

- *I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year the contribution was made, or*
- *the Tax Office 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.*

The information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

Day / Month / Year

Send your completed notice to your super fund.

Do not send it to us. The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.