Perpetual

Perpetual Select Super Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458
Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034

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

Please complete all pages of this form in black ink using BLOCK letters if you wish to claim or vary a tax deduction for personal contributions you made during the financial year to your Perpetual Select Super Plan (Super Plan).

Section A: Your details

1. Tax file number (TFN)

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993. It is not an offence not to quote your TFN, but if you have not previously provided your TFN and you do not quote it now, we are not permitted to accept the contribution(s) covered by this notice. If you provide your TFN, we'll provide your TFN to the trustee of another superannuation fund or retirement savings account provider receiving your transferred benefits now or in the future, unless you ask us not to in writing. An exemption is not considered to be a TFN.

tax file number

2. Name

title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ other ☐

first name(s)

last name

date of birth

phone (business hours)

current postal address

suburb

state

postcode

country

Section B: Super fund's details

fund name: Perpetual's Select Superannuation Fund

fund Australian Business Number (ABN): 5 1 0 6 8 2 6 0 5 6 3

member account type: Super Plan ☐

member account number

Unique Superannuation Identifier (USI)

Section C: Contribution details

Personal contribution details

financial year ended 30 June

my personal contributions to *this fund* covered by this notice: $

is this notice varying an earlier notice? (tick) no ☐ yes ☐

if varying an earlier notice, the amount of these eligible personal contributions claimed in my original notice $

the amount of these eligible 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. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

INTENTION TO CLAIM A TAX DEDUCTION

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

- I acknowledge that the Trustee will quote my TFN to the Australian Taxation Office as required under the law
- I authorise a representative of the Trustee to obtain information from the Australian Taxation Office regarding pension account/s in relation to my TFN, PAYG or other superannuation tax-related matters.

I am lodging this notice at the earlier of **either**:

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made,

or

- before the end of the income year following the year in which the contribution was made.

I declare that at the time of lodging this notice:

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

I declare that the information given on this notice is correct and complete.

first name(s)			
last name			
signature		date	

OR

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

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 acknowledge that the Trustee will quote my TFN to the Australian Taxation Office as required under the law.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated in section C as a tax deduction
- I am a current member of the Fund stated in section B
- my super fund stated in section B still holds these contributions
- this super fund has not begun to pay a superannuation income stream based in whole or in part on these contributions.

I declare that I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice and 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 income 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 year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal 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 valid notice by the amount that has been disallowed.

I declare that the information given on this notice is correct and complete.

first name(s)			
last name			
signature		date	

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