



# Account-Based Pension Plan

## Notification of Tax File Number (TFN)

Under Superannuation Law, the Trustee must request that you supply your Tax File Number for superannuation purposes. Collection of your TFN by the Trustee is authorised by tax laws, the Superannuation Industry (Supervision) Act 1993 and the Privacy Act 1988.

### 1. Your details. Please complete in capital letters and in BLACK INK only

Member No	<input type="text"/>	Date of birth (dd/mm/yyyy)	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Title	<input type="text"/>						(e.g. Mr/Mrs/Ms/Miss/Dr)
Family name	<input type="text"/>						
Given name(s)	<input type="text"/>						

### Contact Details (postal address, telephone, email)

No./Street/PO Box	<input type="text"/>					
Suburb/Town/City	<input type="text"/>					
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>	
Phone: Home no. (inc. STD/ISD)	<input type="text"/>			Business no. (inc. STD/ISD)	<input type="text"/>	
Mobile no.	<input type="text"/>			Fax no. (inc. STD/ISD)	<input type="text"/>	
E-mail address	<input type="text"/>					

### Residential Address

Same as Postal Address above

Different from Postal Address above – you MUST complete below

No./Street	<input type="text"/>					
Suburb/Town/City	<input type="text"/>					
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>	

### 2. Applicant declaration

For the purposes allowed under superannuation law:

I agree to supply my Tax File Number:  -  -  to the Trustee.

OR

I do not wish to supply my Tax File Number to the Trustee. I understand the consequences.

Signed  Date (dd/mm/yyyy)  /  /

### Where to send this form/enquiries

FuturePlus Super  
PO Box N835  
GROSVENOR PLACE NSW 1220  
website: www.futureplussuper.com.au

Phone: 1800 067 059  
(8.30 am – 5.00 pm Mon – Fri)

enquiries: info@futureplussuper.com.au

**DO NOT FAX OR EMAIL THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED**



## IMPORTANT NOTES

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**You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Fund's website.**

### REASONS FOR SUPPLYING YOUR TAX FILE NUMBER (TFN) TO THE TRUSTEE

We are required to tell you the following things before you provide your tax file number (TFN) to the Trustee of the Fund. Your TFN is confidential, and you should know the following things before you decide to provide it.

We can collect your tax file number under the Superannuation Industry (Supervision) Act 1993.

If you do provide your tax file number to us, we will use it only for legislative purposes. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation benefits you may be entitled to, and providing information to the Commissioner of Taxation (amongst other things to enable the Commissioner of Taxation to assess any tax payable on superannuation contributions made by or for you). These legislative purposes may change in the future.

You are not compelled to provide your TFN and deciding not to quote your TFN is not an offence. However, if you do not provide your TFN you may pay more tax on your superannuation benefits than is required – any additional tax may be reclaimed through the tax assessment process if you subsequently provide your TFN. It may also be more difficult to locate or amalgamate your superannuation benefits in the future to pay you any benefits you are entitled to.

These consequences may also change in the future due to legislative change.

If you provide your tax file number to us, we may provide it to the trustee of another superannuation fund or to an RSA provider where the RSA provider or trustee is to receive your transferred benefits in the future. We will not pass on your tax file number to such a trustee or RSA provider if you tell us in writing that you do not want us to do that. We may also give it to the Commissioner of Taxation. Otherwise your tax file number will be treated as confidential.

As a result of recent changes to legislation arising out of the 2006 Federal Budget it is important that you consider giving us your TFN.

**If you or your employer do not provide your TFN to the Fund by the end of the financial year, then all of your concessional contributions will be taxed at the top marginal tax rate, plus the Medicare levy, if they exceed \$1,000. For any accounts that begin after 1 July 2007, the \$1,000 threshold does not apply. Furthermore, your Fund will not be able to accept any non-concessional contributions from you if we do not have your TFN.**

For this reason it is crucial that you consider providing your TFN to the Fund, either directly or through your employer, as soon as possible (if you have not already done so). You should also check your Member Benefit Statement to ensure that your TFN is correctly recorded. For more information please see the PDS or contact Member Services.

### PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in FuturePlus Super while other information is required under Australia's Anti-Money Laundering and Counter-Terrorism Financing Laws.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or the website at [www.futureplussuper.com.au](http://www.futureplussuper.com.au).

### TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take into account your personal objectives, financial situation or needs. Any advice in this document is provided by Chifley Financial Services Limited (ABN 75 053 704 706), as an Australian Financial Services Licensee (AFSL 231148). Chifley Financial Services Limited is an APRA Registrable Superannuation Entity Licensee and the trustee of FuturePlus Super (ABN 76 829 356 693). Chifley Financial Services Limited is co-owned by Energy Industries Superannuation Scheme Pty Limited (ABN 72 077 947 285), Unions NSW, Australian Workers Union (ABN 28 853 022 982 trading as the Australian Workers Union National Office) and the Australian Workers Union (ABN 70 662 384 762 trading as The Australian Workers Union Greater New South Wales Branch).

You should not rely solely on this information and you should consider your own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) or other offer document and seek professional investment advice.

