

# Tax File Number Notification

Please **PRINT** your answers within the boxes in clear **CAPITAL LETTERS** using a **BLACK** pen. Mark answer boxes with an [X].

Before providing your Tax File Number (TFN), please read the information below which outlines important information regarding the collection of your tax file number.

## 1 Member details

Member number	E	R	F														Date of birth		/		/					
Title						Surname																				
Given name(s)																										
<b>Current residential address</b>																										
Unit No						Street No																				
Street name																										
Suburb																	State			Postcode						

## 2 Tax file number details

Collection of tax file numbers is authorised by tax laws, the *Superannuation Industry (Supervision) Act 1993* and the *Privacy Act 1988*. Changes to the Tax File Number (TFN) law require trustees to ask you to provide your TFN to your superannuation fund. Completing this form and providing it to your fund will allow your fund trustee to use your TFN for the purposes contained in the *Superannuation Industry (Supervision) Act 1993*, for paying eligible termination payments and for surcharge purposes.

The purposes currently authorised include:

- taxing superannuation payments at concessional rates
- finding and amalgamating your superannuation benefits where insufficient information is available
- passing your TFN to the Australian Taxation Office
- allowing the trustee of your superannuation fund to provide your TFN to a superannuation fund receiving any benefits you may transfer.

Your trustee will not pass your TFN to any other fund if you tell the trustee in writing that you do not want them to pass it on.

You are not required to provide your tax file number. Declining to quote your TFN is not an offence. However, if you do not give your superannuation fund your TFN, either now or later:

- you may pay more tax on your superannuation benefits than you have to (you may get this back at the end of the financial year in your income tax assessment)
- it may be more difficult to find your superannuation benefits if you change address without notifying your fund or to amalgamate any multiple superannuation accounts
- this may delay payment of your benefits.

The lawful purposes for which your TFN can be used and the consequences of not quoting your TFN may change in future, as a result of legislative change. For more information, please contact our client services team on 1800 677 306 or the ATO Superannuation Helpline on 13 10 20.

**I have read the above and agree to provide my Tax File Number (TFN).**

Tax File Number													
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## 3 Authorisation

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Signature

Date   /   /

**Please sign and return this form to:**

**Post:** SMF Eligible Rollover Fund, GPO Box 529, Hobart Tas 7001  
**Email:** email@ioof.com.au  
**Facsimile:** 03 6215 5933  
**Client services team:** 1800 677 306  
**Website:** www.ioof.com.au  
**Trustee:** IOOF Investment Management Limited, ABN 53 006 695 021, AFS Licence No. 230524