

# Employer Guide to Tasplan Super

This Guide should be read in conjunction with the Tasplan Product Disclosure Statement

Issued: 1 May 2011



Making super **hassle-free** for business

Incorporating



**TASPLAN**  
Your Choice for Super



**TASPLAN**

Your Choice for Super



**Issuer: Tasplan Ltd**

Licensee: Tasplan Ltd  
RSE Licensee L0000680  
AFS Licence No. 235391  
ABN: 13 009 563 062 (Trustee)

**Fund Registration Details:**

ABN: 14 602 032 302 (Tasplan Super)  
RSE No. R1000924  
SFN: 123481940  
SPIN: TPN0100AU

**Offices:**

**Head Office**

Level 4, 111 Macquarie Street,  
Hobart TAS 7000

**Launceston Office**

45 Cameron Street,  
Launceston TAS 7250

**NSW Office**

1A Homebush Bay Drive,  
Rhodes NSW 2138

**Postal Address:**

GPO Box 1547, Hobart, TAS 7001

**Telephone:** 1800 005 166

**Facsimile:** 1300 737 736

**E-mail:** [info@tasplan.com.au](mailto:info@tasplan.com.au)

**Web Site:** [www.tasplan.com.au](http://www.tasplan.com.au)

**Cover Photo:**

Kayte Roberts & Alice Mudge from Running Edge, Hobart

*Information in this document is of a general nature only. It has been prepared without taking into account your particular financial needs, circumstances and objectives. You should assess your own financial situation and read the Product Disclosure Statement (PDS) relating to the products before making a decision based on this information. You may wish to seek the help of an adviser to do so. Please call 1800 005 166 to obtain a copy of the Tasplan PDS. Consent has been obtained to publish all pictures and personal statements contained in this document.*

## Contents

### Easy Super Steps for Employers

#### Step 1 Benefits for You and Your Employees

About Tasplan	3
What Tasplan can offer you, the employer	3
How Tasplan communicates with you	4
How Tasplan communicates with your employees	4
What Tasplan can offer your employees	5

#### Step 2 Understanding Your Obligations

Your obligations	6
Checklist of "Ordinary Time Earnings"	6
Who you have to pay Super for	6

#### Step 3 Helping You Manage Your Super

Using the Contribution Return	9
How to make payments	10
Employer details form	11
Joining is easy	12
Complying Fund Statement	12
Contribution return form	13



Thank you for your interest in Tasplan. By choosing to receive a copy of this booklet, you have taken the first step toward simple, no-fuss superannuation.

Read on to find out why Tasplan is one of Australia's leading industry superannuation funds, and how we can help to save you time and effort in meeting your superannuation obligations.

This guide should be read in conjunction with Tasplan's Product Disclosure Statement (PDS). If you have not received a copy, please contact our office on 1800 005 166 to arrange for one to be sent to you or visit our website.

**Neil Cassidy,**  
CEO

## About Tasplan

Tasplan is a multi-industry superannuation fund, established solely to meet the retirement needs of employees across all industries.

Since commencing operation in 1987, Tasplan has grown to become Tasmania's largest industry superannuation fund.

Jointly sponsored by the Tasmanian Chamber of Commerce and Industry (TCCI) and Unions Tasmania, the Fund is managed by a Trustee Company, Tasplan Ltd (ABN 13 009 563 062).

The Board of the Trustee Company comprises experienced Directors who are nominated by the sponsoring organisations. The Trustee Board is responsible for all decisions concerning the

management of Tasplan. Tasplan does not pay agents' fees or commissions.

Tasplan is a "regulated and complying fund" under the *Superannuation Industry (Supervision) Act 1993*. This means that Tasplan can accept Superannuation Guarantee (SG) contributions and rollovers from other complying funds and attracts concessional tax treatment.

Tasplan is Public Offer and has received its Registered Superannuation Entity (RSE) licence from the Australian Prudential Regulation Authority (APRA).

## What Tasplan can offer you, the employer

### With so many funds to choose from, why choose Tasplan?

Tasplan is one of Australia's leading superannuation funds. It's not difficult to see why.

#### It's easy to use

Tasplan is so easy for employers to use. You can choose how you want to do business with us, with a range of smart paper and electronic solutions to choose from. You can make your payments via your payroll system or with our easy online system. We'll give you all the support and information you need to manage your superannuation obligations quickly and easily.

#### Superior service and support

Tasplan employs a professional administration team, with representation and offices in Tasmania and NSW, which means we can respond to your needs quickly and efficiently, with that friendly Tasplan touch.

#### Personal service right to your door

We recognise that sometimes, a phone call or letter just isn't enough. That's why Tasplan employs professional Client Services Managers to provide you with personal service. If you would like someone to visit your workplace to assist you or your employees with superannuation issues, help is only a phone call away.

#### It's free

There are no charges to you, the employer, for using Tasplan.

**Our service to you is completely free of charge.**

#### Financial Literacy Workshops

These sessions are designed to improve the financial literacy of employees and to aid their understanding of issues like superannuation, insurance and debt management.

These workshops can be customised to meet the needs of your employees.

#### What our employers say:

"For someone that has not used a superannuation online payment system before I found the Tasplan online access very easy to use with simple, self-explanatory instructions along with being very time saving. The team from Tasplan were very helpful in showing us all the features."

*Leanne Clark, Diabetes Tasmania*

"After using a number of other Superannuation websites to enter contribution details, I have found the Tasplan website to be the easiest and most user friendly of all the websites. As most of our employees are with Tasplan, this makes my job of administering superannuation much less time consuming and more efficient. If ever there is a problem, the staff at Tasplan are very helpful, and it is quickly solved."

*Bev Smith, Marinova*

# How Tasplan communicates with you

## A monthly Contribution Return

Most employers find it easiest to make their superannuation payments once a month. Tasplan will send you a Contribution Return each month, which you can fill out and return to us with your cheque. There is space on the Contribution Return to add new employee details and to tell us if someone has left your employment.

You do not have to use the Contribution Return - you can send your payments electronically through your payroll system or over the internet if you wish. These methods of payment are described on page 10.

## Employer newsletter

Tasplan produces a newsletter specifically for employers which is emailed or posted depending on employer preference every three months or so. The newsletters contain information about recent developments in superannuation and issues of interest to business.



## Online enquiry service

Email any questions or comments to [admin@tasplan.com.au](mailto:admin@tasplan.com.au)  
We will respond promptly!

## Other updates from time to time

If there is a new development that falls between quarterly newsletters, Tasplan will issue a special notice to you.

## Personal contact when you need it

Tasplan's Client Services Managers are available to visit your workplace and help you and your employees with any superannuation issues. Call our **Customer Service Team** on **Freecall 1800 005 166** or email [admin@tasplan.com.au](mailto:admin@tasplan.com.au) to arrange a visit.

# How we communicate with your employees

## A welcome letter

All members receive a welcome letter confirming they have joined Tasplan.

## An annual statement

An annual statement, for the financial year ended 30 June, is mailed to each member's home address. The statement contains details of all transactions throughout the year, including contributions, transfers, payments, fees, insurance premiums, interest and Federal Contribution Tax.

## The trustee report

Tasplan produces an annual report which is made available via the Tasplan website [www.tasplan.com.au](http://www.tasplan.com.au). A hard copy is posted to members on request. The trustee report contains essential financial information about the plan, including where members' money has been invested.

## Mid-Year Report

A mid-year report is mailed to members in March and contains information about contributions made to their account during the first six months of the financial year - 1 July to 31 December.

## [www.tasplan.com.au](http://www.tasplan.com.au)

Tasplan's web site is not only great for employers, but it is also an excellent source of information about Tasplan and superannuation for your employees.

## Facebook

Find us on Facebook (type in Tasplan in the search field), view our Super - straight up Pod Casts that explain super in Plain English. Sign up as a fan to receive future Pod Cast updates, access to competitions and make your views known to Tasplan.

# What Tasplan can offer your employees

Tasplan charges a flat \$2.15 per week administration fee (indexed annually). For other transaction - based fees which may apply, refer to the Tasplan Product Disclosure Statement.

## All profits are returned to members

Tasplan is a profit to members fund, which means all profits are returned to members via investment returns and increased services. The Plan does not pay agents' fees or commissions.

## Portability

Being a multi-industry, public offer fund, most employers are able to contribute to Tasplan. That means even when a member changes jobs, they can keep their Tasplan account with their new employer.

## Insurance cover

Most Tasplan members are eligible for the death and disablement insurance cover offered by the fund. Members can apply for additional cover if they wish; optional income protection cover is also available.

Tasplan insurance cover meets the minimum requirements of the Federal Government's choice of super legislation.

## Access to low-cost home loans and banking products

Tasplan members are able to apply for low interest home loans through ME Bank (ME). ME is consistently rated as one of the lowest variable rates in the Australian market.



ME also provides low-cost banking services for members, including credit cards, savings accounts and personal loans. Members Equity also provides low-cost loans to participating Tasplan employers.

## Strong investment returns

Tasplan has a proven track record of strong investment performance and solid growth. Our strength and size allows us to

negotiate with investment managers and seek the best possible deal for our members.

Refer to Tasplan's Product Disclosure Statement for information about investment returns and investment options for members.

## Member investment choice

Members can choose from five investment options with varying risk profiles and investment strategies. Members can mix and match any of the investment strategies below to ensure the best possible match to their risk profile.

Members can also choose a mix of investment options for their existing account balance and different options for future contributions.

Investment Strategy	Asset Type	
Cash	100% Defensive	
Short Term Defensive	70% Defensive	30% Growth
Balanced	30% Def	70% Growth
Longer Term Growth	10%	90% Growth
Equities	100% Growth	

## Financial planning advice

Tasplan offers affordable financial planning for you or your employees. Financial planning is about making your hard earned cash work harder for you.

Tasplan's financial planners are licensed to give advice on all financial matters.

You receive a quote during your first meeting. You will be quoted a fixed fee – there are no commissions (either upfront or ongoing).

If you don't agree to the fee you are quoted, you have the right to walk away, obligation-free. If you do agree, your financial plan will be developed.

There are experienced financial planners located in all States and Territories.

Tasplan financial planners are representatives of Industry Fund Financial Planning, a division of Industry Fund Services Pty Ltd (IFS) ABN 54 007 016 195 AFSL 232514.

# Your obligations

Most Australian businesses are required to make superannuation contributions on behalf of their eligible employees into a complying superannuation fund or retirement savings account.

## How much super to pay

The Federal Government’s Superannuation Guarantee (SG) legislation requires employers to pay a minimum of 9% of an employee’s Ordinary Time Earnings (OTE).

Ordinary Time Earnings is the total of the employee’s earnings for ordinary hours of work, over award payments and shift loadings, bonuses and commissions and paid leave.

## How often to pay

Businesses must make superannuation contributions on at least a quarterly basis unless otherwise stipulated in an industrial award or workplace agreement (some awards and/or agreements require that contributions be made monthly).

Under SG legislation, contributions are required to be made by the 28th day of the month following the end of the quarter for which payment is required.

The following table provides an easy guide to when payments are required.

SG Quarter	Due date for payment
1 July - 30 September	28 October
1 October - 31 December	28 January
1 January - 31 March	28 April
1 April - 30 June	28 July

Tasplan recommends that employers pay contributions monthly to ensure that employee benefits are protected and to ensure compliance with SG legislation.

## Which employees are eligible?

An employer must make superannuation contributions for employees if their gross salary and wages in any calendar month exceeds the Federal Government’s threshold, which is currently set at \$450 per month. The exceptions are for: Employees who are under 18 years of age and who work less than 30 hours per week; and Employees aged 70 or over.

Note: Employers may still have to pay super for earnings less than \$450 per month and if an award or workplace agreement specifies it.

## Awards and industrial agreements

Where a business operates under an award or industrial agreement, the amount of superannuation to be paid is the amount specified therein – even if it is an amount greater than the required SG amount.

# Checklist of “Ordinary Time Earnings”

The following checklist is a guide to, what is, and what is not considered “ordinary time earnings” (OTE) for SG purposes, by the ATO.



Payment	OTE?
Annual leave loading	No
Allowances, award payments	Yes
Bonuses not related to performance activity (e.g. Christmas)	No
Bonuses (performance-based)	Yes
Commissions	Yes
Casual loading	Yes
Director fees	Yes
Fringe benefits (subject to FBT)	No
Leave accrued and paid on termination (annual holiday, long service, sick)	No
Paid leave taken (sick, annual holiday long service)	Yes
Payments for domestic or private work less than 30 hours per week	No
Payment in lieu of notice	No
Payments other than for termination	No
Overtime	No

Payment	OTE?
Over award payments	Yes
Reimbursement of expenses (travel, operating)	No
Salary using Gov’t subsidies	Yes
Shift loading	Yes
Top-up payments (jury and Defence Force services)	No
Workers compensation payments + top-up payments where no work is performed	No
Workers compensation payments + top-up payments where work is performed	Yes
Payments for performing in artistic, sporting and promotional displays or providing services in connection with such displays	Yes
Payments in connection with the making of any film, tape or disc	Yes
Payments for any TV or radio broadcast	Yes

If an employer is unsure of award requirements, the relevant State or Federal Government Department or employer association may be able to provide advice.

### Choice of Super

If your business is incorporated, or where your Award or Workplace Agreement simply refers to the SG obligations, you may be required to offer your employees the choice of where they'd like their super contributions paid to.

### Standard Choice Form

The Federal Government has released a **Standard Choice Form** to be used by an employee in the selection of a superannuation fund.

**Part A** is the information an employer is required to give to employees (i.e. details of the Employer Fund).

**Part B** lists the information an employee is required to give an employer.

An employee must provide an employer with the following information when choosing a super fund:

- details of employee's chosen fund and account information (if currently a member)
- evidence that it is a complying fund and will accept employer contributions
- details of how an employer can make contributions.

It is possible that an employee's advice about choice will come in the form of a pre-completed form provided by their preferred fund. These forms will generally feature a statement from that Fund that it meets all choice requirements.

Where advice is received in some other written form, it must contain the information listed in Part B of the Standard Choice Form.

Please note that the information supplied by an employee does not have to be on a Standard Choice Form and even if it does not include all of the information prescribed in Part B, an employer is still able to process the employee selection. It's the prerogative of a business to accept or reject an incomplete choice advice. Employers should make sure they have enough information to meet the record-keeping requirements.

### Time for Processing Choice

Businesses required to offer a choice of superannuation fund must issue new staff with a Standard Choice Form within 28 days of commencement and make superannuation contributions to an eligible choice fund that they nominate. An employer must also provide an employee with a Standard Choice Form within 28 days of a written request being received.

If an eligible employee decides not to exercise choice, their super contributions are to be paid into an Employer Fund selected by the employer. The employee may select a super fund at any time but they are only permitted one selection each twelve months unless otherwise agreed with the employer.

A business will have to process a Choice Form and commence employer contributions into a nominated fund within two months.

### Employer (Default) Fund

Where an employee has not nominated a fund, or the employer does not accept the employee choice advice, (it may not contain all of the necessary information about the selected fund or the employer is unable for some reason to contribute to that fund) a business will pay the super contribution to an Employer Fund in order to satisfy the employer's Superannuation Guarantee obligation successfully.

Generally, the Employer Fund can be any complying superannuation fund chosen by the employer, provided it offers life insurance of a kind specified in the regulations. The Employer Fund will generally be one that is nominated in the applicable award – unless for some reason a business nominates another Employer Fund.

### What records does an employer need to keep?

Employers affected by Choice must maintain records to show that they have met their choice of superannuation fund obligations.

This includes:

- details of employees who haven't been offered choice and a record of the reason;
- a record to show that existing (and new) employees have been offered choice;
- Written information provided by the employee when they make their choice; and
- evidence that the employee's chosen fund is complying and meets the insurance requirement.

Records must be in English and kept for a period of 5 years.

If records are in some electronic form (i.e. on disc) they must be in a form that is readily accessible and easily converted to written English. Records can be in the form of email.

Remember, where a Choice Form is not returned and contributions are made to the Employer Fund, there is likely to be NO record of choice so it is important an employer can prove that an original offer was made.

Further information about choice of fund can be obtained from the Tasplan website at [www.tasplan.com.au](http://www.tasplan.com.au) or from the ATO on 13 28 64.

## Step 2 Understanding Your Obligations

### Tax File Number obligations for employers

When your employee fills out a Tax file number declaration (NAT 3092) form you must pass on the employee's TFN to their super fund or retirement savings account (RSA) provider.

You must give the TFN to your employee's fund by whichever is the later of the following:

- for new employees – when you make the first contribution for them
- for existing employees – when you make the next contribution for them, or
- within 14 days after receiving their Tax file number declaration (NAT 3092) form.

This will not apply if you do not make employer contributions for your employee, for example where you pay your employee less than \$450 in a calendar month.

You could face penalties if you do not pass an employee's TFN on to their super fund within the required time frame.

Your employees face significant consequences if their super funds do not have their TFNs, which we encourage you to tell them about.

For example, their employer contributions may be taxed an additional 31.5% and their super fund may not be able to accept personal contributions. This means eligible employees could miss out on receiving a government super co-contribution.

### Super and Privacy

Lost Super is a significant problem in this country with over two million Australians having a share in an amount approaching \$14 billion in Lost Super.

People relocate or change jobs and forget to tell their super fund; they become 'disconnected' from their super.

Tasplan would like to work with participating employers to keep members 'connected' to their superannuation.

Businesses are permitted to provide employee contact details to a superannuation fund to help it keep its records accurate and up to date.

Section 7B of the Privacy Act exempts employee records from the Privacy Act in situations where the employer is providing information to a super fund.

Acts and practices of employers in relation to employee records as they relate to current and former employment relationships are

exempt from the National Privacy Principles; in other words, an employer is doing nothing wrong by helping a super fund update its records.

By helping Tasplan to keep its records accurate, a business is playing an important part in keeping Australians attached to their super.

For full details of Tasplan's privacy policy refer to the Product Disclosure Statement.

### What about personal contributions from employees?

Under superannuation legislation, employees' personal contributions deducted from salary or wages must be forwarded to a complying superannuation fund no later than 28 days after the end of the month in which the contributions were deducted.

### Types of contributions

#### Employer contributions:

These are the Superannuation Guarantee (SG) or award payments that an employer is required to make for employees.

Employers may also choose to pay employees an amount above the SG or award rate as part of an employment agreement.

#### Salary sacrifice contributions:

Many employers now permit employees to make salary sacrifice contributions. This is an arrangement between an employer and employee whereby the employee's gross salary is reduced by a certain amount, and the employer's contribution to the employee's superannuation is increased by that same amount.

We have included a separate column on the "Contribution Return" for you to list your employee's salary sacrifice contributions. Please contact us if you would like further information on salary sacrifice.

#### Member contributions:

Some employers help their employees to make regular super contributions by deducting an amount from the employee's pay and forwarding it to Tasplan. The difference between member contributions and salary sacrifice contributions is that member contributions are deducted from the employee's net wages, ie. after tax, and salary sacrifice contributions are deducted from the employee's gross wages, ie. before tax.

# Using the Contribution Return

If you do not select an electronic method of payment (refer to page 10), Tasplan will send you a contribution return monthly or quarterly.

The contribution return lists all the current members you have enrolled in Tasplan subject to any unprocessed contribution returns. If any details are incorrect or missing, please tell us with your next payment.

Number of weeks covered by this contribution return. If the number of weeks does not match the period you are paying for all or some members, please adjust the weeks in the box provided for each member affected.

Period covered by this contribution return.

Please enter in this column (next to each member name) the total amount of any Salary Sacrifice contributions (if applicable) you are paying.

Members can be listed in:

- Alphabetical order
- Member number order

If having the return in a different order will help you, please contact the Customer Service Team.

Sometimes 'Notes' are printed under members' names. Please help us by actioning the requests as soon as possible.

Make your cheque payable to Tasplan Super. Send your cheque and completed contribution return and all other documents to the address shown here.

Please enter in this column next to each member name, the total amount of Employer Contributions you are paying.

Please enter in these boxes any under/over payment adjustments from previous month/s, as indicated on your Account Summary.

If a member makes additional personal contributions to Tasplan, please enter in this column the amount next to his/her name.

The 'Grand Total' should be the amount of your payment including the payments for new members from the Member Listing.

The Member Listing allows you to do a number of things:

To enrol a new employee as a member of Tasplan, please complete this section together with the contributions you are paying for them.

- if they are an existing member of Tasplan through a previous employer, enter their Fund membership number in the space provided.
- if they are not a member of Tasplan, please ask them to complete a 'Membership Application' form and attach it to the contribution return.

If a member changes address, please advise us of the new address.

Should you require any supplies of Member Application forms, please enter the number you require here and they will be sent to you.

## How to make payments

Tasplan is committed to making it as easy as possible for participating businesses to make their regular super contributions. No matter how many employees you have and irrespective of how often your award requires you to make super payments (monthly/quarterly) – **Tasplan has a payment option to suit every business.**

While each business has its own operation and requirements, the following guidelines may be useful to you:

### If you have up to 20 employees:

#### Making payments online:

Employer Access works in a similar way to the Contribution Return, but all details are stored in your secured internet account.

You can access your account to enter details of your contribution and then pay via BPay\*, EFT\*\*, or authorised bank transfer\*\*\*.

This eliminates the need for any paperwork to be sent to us.

Employer Access can:

- Apply contributions for your employees
- Add new employees
- Advise termination of a member's employment
- Update member details such as addresses
- Print reports of contributions
- View previously applied contributions
- Pay contributions via direct debit and send contribution information to Tasplan as one transaction.

### If you have more than 20 employees:

Using your payroll system or a spreadsheet should be the quickest and easiest way for you to make payments.

#### Making payments using a spreadsheet

Tasplan can help you to format an Excel spreadsheet. The spreadsheet will be formatted to contain all of your employees' details so that each month, you only have to update the amount of payment and any changes to employee details.

#### Making payments using your payroll system

Tasplan can accept electronic files from many payroll systems. Please contact us for more information about this option.

#### Making contributions to multiple super funds?

Tasplan offers a clearing house facility referred to as SUPERCLEAR. You make your payments as normal to Tasplan and your other contribution payment obligations can be met by making a single payment through SUPERCLEAR. By providing the details of the contributions and single payment to SUPERCLEAR, they will direct the contributions to the various funds selected by your staff. SUPERCLEAR does the hard work for you, saving you time and eliminating the frustration of dealing with multiple funds. If you want more information on this facility, please contact us on 1800 005 166 or send an email to [info@tasplan.com.au](mailto:info@tasplan.com.au)

#### Contribution Return

If none of the above are suitable, we'll continue to send a hardcopy of your monthly/quarterly return and you can make payments by cheque, BPay\* or EFT\*\*.

\***BPay** - you will be issued with a username and password together with the Tasplan BPay code and unique reference number.

\*\***EFT (Electronic Funds Transfer)** - you will be issued with a username and password together with Tasplan's bank account details.

\*\*\***authorised bank transfer** – you will be sent a form to be completed with your nominated bank account details. Then a username and password will be issued to you.

## Select the payment option that best suits your business



Any enquiries can be directed to Tasplan

- Ph: 1800 005 166
- Fax: 1300 737 736
- Email: [info@tasplan.com.au](mailto:info@tasplan.com.au)



**TASPLAN**  
Your Choice for Super



**TASPLAN**  
Your Choice for Super

# TASPLAN Employer Details



**TASPLAN**  
Level 4, Reserve Bank Building  
111 Macquarie Street,  
Hobart TAS 7000  
GPO Box 1547, Hobart TAS 7001

Freecall: 1800 005 166  
Fax: 1300 737 736  
Email: info@tasplan.com.au  
Web: www.tasplan.com.au

Please provide the following contact details to help us communicate with your business about superannuation.  
When completing this form, please use a black pen and write in **BLOCK** letters. This request will be invalid if unsigned.  
Once completed, please return to: Tasplan Super GPO Box 1547 Hobart TAS 7001

## Section 1: Employer Details

Registered Name  
 Trading Name  
 Australian Business Number (ABN)  
 Is Tasplan your default superannuation fund?  Yes  No  
 Pay Period: Weekly  Fortnightly  Monthly  Quarterly  Annually   
 Pay Date (DD/MM/YYYY)  
 Type of Business / Industry  
 Industry Code (see below)

<b>AHS</b> ACCOMMODATION AND HOSPITALITY	<b>COM</b> COMMUNICATIONS AND INFORMATION TECHNOLOGY	<b>MAN</b> MANUFACTURE AND PROCESSING	<b>RTL</b> RETAILING AND WHOLESALING
<b>AGE</b> AGED CARE AND COMMUNITY SERVICE	<b>CON</b> BUILDING AND CONSTRUCTION	<b>MED</b> HEALTH AND MEDICAL SERVICES	<b>SEC</b> SECURITY SERVICES
<b>AGF</b> AGRICULTURE AND FORESTRY	<b>CUL</b> CULTURAL AND RELIGIOUS SERVICES	<b>MIN</b> MINING AND EXPLORATION	<b>TRD</b> TRADESMAN AND CONTRACTORS
<b>AQU</b> AQUACULTURE AND FISHING	<b>EDU</b> EDUCATION AND TRAINING	<b>PER</b> PERSONAL AND OTHER SERVICES	<b>TRV</b> TRAVEL AND TOURISM
<b>BCO</b> BUS AND COACH OPERATORS	<b>BMP</b> EMPLOYMENT AND INDUSTRIAL RELATIONS	<b>PHA</b> CHEMISTS AND PHARMACEUTICAL	<b>TRN</b> TRANSPORT AND STORAGE
<b>BFS</b> BUSINESS AND FINANCIAL SERVICES	<b>GOV</b> STATE AND LOCAL GOVERNMENT	<b>REA</b> REAL ESTATE AND PROPERTY	<b>VEH</b> VEHICLES SALES AND SERVICE
<b>CHD</b> CHILD CARE SERVICES	<b>LAW</b> LEGAL AND ADVISORY SERVICES	<b>REC</b> CLUBS AND RECREATIONAL SERVICES	

## Section 2: Contact Details

Mr/Mrs/Ms/Miss Surname  
 Given Names  
 Street Number / PO Box Street Name  
 Suburb / Town / City State Postcode  
 Contact Telephone Number (during work hours) Mobile  
 Position within Business  
 Email address (use upper case and lower case as appropriate)

## Section 3: Contributions

Would you like to process your contribution online? Yes  No  If **Yes**, what is your preferred payment option? BPay  EFT   
 Self-initiated Direct Debit   
 How regular would you like to make your payments? Monthly  Quarterly   
 Date (DD/MM/YYYY)  
 What date are contributions to start from?

## Section 4: Authorisation

I have read the fund's Product Disclosure Statement and understand that by completing this form, my business will become a participating Tasplan employer.  
 Employer's Signature  
 Dated (DD/MM/YYYY)

**Need Help? Call us on Freecall 1800 005 166**

## Joining is easy

### ✔ Step 1 - Forms to complete

Complete the **Employer Details Form** and post to us **when completed**. This provides us with the necessary information to manage your account.

### ✔ Step 2 - Forms for your staff

Supply each of your employees with a Tasplan Product Disclosure Statement, which includes a Member Application Form. Supplies of this booklet can be obtained by calling our Customer Service Team on 1800 005 166. The booklet can also be downloaded from the Forms and Publications page on Tasplan's website [www.tasplan.com.au](http://www.tasplan.com.au)

Each employee must complete the Member Application Form to ensure that:

- We correctly record the member's wishes in regard to level of insurance cover and nominated beneficiaries
- There is no duplication of member records
- Tasplan is able to communicate with them regarding their benefits.

### ✔ Step 3 - Your first payment

Simply fill in the blank 'contribution return', at the back of this booklet, with all your payment details, and return it to us with your cheque. After your first payment, you will receive an account summary and a new pre-printed contribution return to use with your next contribution. You may prefer to process and pay your contributions online.

Please indicate on your Employer Details Form if you would like to set up an online option.

***You can even send us your first payment together with the forms in Step 1 if you wish.***

#### Mail All Forms

Send the completed member **Application Form/s** and **Employer Details Form** to Tasplan, at **GPO Box 1547, Hobart TAS 7001.**

## Complying Fund Statement

Employees are required to provide employers with evidence that the fund into which they want their money to be paid is a complying fund. The statement below about Tasplan meets this requirement and may be retained for record – keeping purposes.

On behalf of the Trustee, I can advise that **Tasplan Super:**

- Is a Regulated and Complying Superannuation Fund within the meaning of the Superannuation Industry (Supervision) Act 1993.
- Is an eligible choice fund and meets the requirements (including insurance) to be nominated as an employer fund under the choice of superannuation fund legislation.
- Accepts transferred and rolled over benefits with no minimum benefit amount.
- Tasplan has received its Registered Superannuation Entity (RSE) licence from the Australian Prudential Regulation Authority (APRA).

#### Acceptance of Contributions

If a business is already a Tasplan Participating Employer, the fund can accept contributions immediately.

New business only need to complete enrolment documentation (Employer Details Form) contained in this Employer Guide.

#### How to Contribute

There are a number of different ways that an employer can make contributions to Tasplan. Cheques should be made payable to "Tasplan Super" and sent to Tasplan, GPO Box 1547, Hobart TAS 7001.

**Electronic payment options are also available.** Employers should contact the fund to determine which method of payment best suits their business.

Any questions can be directed to our Client Service Centre on Freecall **1800 005 166** or email us at [info@tasplan.com.au](mailto:info@tasplan.com.au)

CEO  
Tasplan Super

If your employee is new to Tasplan please complete their details on the back of this form.



**TASPLAN**  
Your Choice for Super



## CONTRIBUTION RETURN

**Employer Name**

**Employer Number**

**Contribution Period**  
 From  /  /  to  /  /

**Contribution Number**

- MEMBER STATUS CODES**
- RESIGNED RS
  - RETIREMENT RT
  - DEATH DT
  - TOTAL & PERMANENT DISABLEMENT TP
  - LEAVE WITHOUT PAY LP
  - PARENTAL/MATERNITY LEAVE ML
  - TEMPORARY DISABLEMENT TD
  - COMPANY TRANSFER CT
  - OTHER OR
  - WORKERS COMP WC

Line	Member No.	Member Name Last Name / First Name	Date of Birth DD MM YYYY	Weeks*	Employer Contribution Dollars Cents	Salary Sacrifice Dollars Cents	Member Contribution Dollars Cents	Terminated Members* D M M Y Y	Code
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									

Please make your cheque payable to, and mail to:

**Tasplan Super**

GPO Box 1547 HOBART TAS 7001  
 Freecall: 1 800 005 166  
 Fax: 1 300 737 736

**Subtotal** —

New Employees Total  
(from the reverse side)

Adjust over/under  
payments here

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

**Grand Total**

\* indicate number of weeks covered initial payment  
 Licensee: Tasplan Ltd, ABN 13 009 563 062 Capacity: AFS Licensee AFS Licence No. 235391

\* Note: Members will not be deleted from the  
 Contribution Return until this information is provided.



# We'll take care of the Super – so you can run your business



**Brett Mason**  
Client Services Manager  
NSW  
02 8837 5023  
0428 212 070  
bmason@tasplan.com.au



**Mike Dalton**  
Client Services Manager  
Hobart  
03 6224 4706  
0438 216 170  
mdalton@tasplan.com.au



**Rex Burdon**  
Client Services Manager  
Hobart  
03 6224 4705  
0417 554 252  
rburdon@tasplan.com.au



**Sonya Buckley**  
Client Services Manager  
Launceston  
03 6334 9430  
0438 216 168  
sbuckley@tasplan.com.au



**Peter Murphy**  
Client Services Manager  
Launceston  
03 6332 9329  
0457 590 202  
pmurphy@tasplan.com.au

## Here are the reasons why over 10,500 businesses choose Tasplan to manage their employee superannuation

- personal service from a local team
- training for payroll / H.R. staff
- workplace presentations for employees on all super-related issues (e.g. co-contribution scheme, salary sacrifice, insurance etc.)
- regular communication (Employer Newsletters, Tasplan website, briefing papers)
- business-friendly systems and smart paper solutions
- range of electronic payment options
- contribution method to suit every business
- workplace visits and business information sessions
- low cost business loans (through ME Bank)

To arrange a visit by a Client Services Manager,  
contact us on 1800 005 166 or email Tasplan at  
[admin@tasplan.com.au](mailto:admin@tasplan.com.au)



**TASPLAN**  
Your Choice for Super



# TASPLAN

Your Choice for Super



## Contact Details

### Issuer: Tasplan Ltd

RSE Licensee L0000680

AFS Licence No. 235391

ABN: 13 009 563 062 (Trustee)

### Fund Registration Details:

ABN: 14 602 032 302 (Tasplan Super)

RSE No. R1000924

SFN: 123481940

SPIN: TPN0100AU

### Offices:

Head Office

Level 4, 111 Macquarie Street,  
Hobart TAS 7000

### Launceston Office

45 Cameron Street,  
Launceston TAS 7250

### NSW Office

1a Homebush Bay Drive,  
Rhodes NSW 2138

### Postal Address:

GPO Box 1547, Hobart, TAS 7001

**Telephone:** 1800 005 166

**Facsimile:** 1300 737 736

**E-mail:** [info@tasplan.com.au](mailto:info@tasplan.com.au)

**Website:** [www.tasplan.com.au](http://www.tasplan.com.au)

## Why Employers like Tasplan

**It's easy to use** - Employers choose how they want to do business - with a range of smart paper and electronic solutions to choose from.

**Superior service and support** - No long waits in telephone queues to get answers to your questions. Tasplan has professional staff in NSW and Tasmania ready to deal with queries quickly and efficiently.

**Personal service at your workplace** - Tasplan's Client Services Managers will visit your business to assist payroll staff and to answer questions or provide a presentation on any superannuation issue.

**It's free!** - There are no charges whatsoever for employers to make their superannuation contributions to Tasplan.

**Your Employees Benefit** - Tasplan has a proven record of strong investment returns and provides a range of services and benefits to your employees.

**We keep you informed** - In addition to copies of our Employer News newsletter being forwarded to all participating employers on a quarterly basis, Tasplan provides information sheets and commentary on major superannuation issues of interest to employers with monthly contribution returns.