



TASPLAN

Individual Tax File Number Notification form




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

When completing this form, please use a **black** pen and write in **BLOCK** letters.
Once completed, please return to: **TASPLAN GPO Box 1547 Hobart TAS 7001**

Section 1: Member details

| | |
|---|--------------------------------|
| Membership Number | Date of Birth (DD/MM/YYYY) |
| | |
| Surname | |
| | |
| Given Names | |
| | |
| Mother's Maiden Surname (for security purposes) | Daytime Contact Number |
| | |
| | |
| | Tax File Number |
| I agree to provide my Tax File Number: <input type="checkbox"/> Yes | OR <input type="checkbox"/> No |
| I agree that my TFN can be provided to the Trustee of a new fund, if I transfer or rollover my benefit <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Your signature | Date (DD/MM/YYYY) |
|  | |

Section 2: Privacy

Please note that by sending Tasplan personal information about yourself, you are agreeing to the following:

1. That you have read the Tasplan Privacy Statement and understand how Tasplan intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
2. That Tasplan can use it for the purposes of running your superannuation account.

If you have any questions about your rights under the privacy legislation, please call Tasplan on 1800 005 166.

Collection of tax file numbers is authorised by tax laws, the *Superannuation Industry (Supervision) Act 1993* and the *Privacy Act 1988*. We are required to ask you to provide your tax file number to us. By completing this form and providing it to us you will allow the fund trustee to use your tax file number for the purposes contained in the *Superannuation Industry (Supervision) Act 1993* and for the purpose of paying superannuation benefits.

The purposes currently authorised include:

- taxing superannuation payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient information is available;
- passing your tax file number to the Australian Taxation Office; and
- allowing the trustee of your superannuation fund to provide your tax file number to a superannuation fund receiving any benefits you may transfer. Your trustee will not pass your tax file number 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 tax file number is not an offence. However, if you do not give your superannuation fund your tax file number, 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;
- Tasplan will not be able to accept any voluntary contributions from you;
- any superannuation contribution paid by your employer on your behalf will be accepted but will be subject to tax at the top personal marginal tax rate; and
- this may delay payment of your benefits.

The lawful purposes for which your tax file number can be used and the consequences of not quoting your tax file number may change in future, as a result of legislative change.

For more information, please contact Tasplan on Freecall 1800 005 166 or the ATO Superannuation Helpline on 13 10 20.

Specific notes for employers

- If an employee provides you with his or her tax file number for superannuation purposes (e.g. on this form), you are required to pass it on to the superannuation fund within 14 days or with the next contribution.
- Employers who do not meet the above requirement may be subject to a penalty of up to 10 penalty units (currently \$1,000).
- You may disclose the tax file number quoted on this form to the employee's superannuation fund. It is against the law to disclose the tax file number quoted on this form to any other fund or person.



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