

Tax file number notification

Please complete this form in CAPITAL letters.

Questions? Contact us on 1300 654 720 or smartsave@onevue.com.au.

Use this form to:

- ▶ provide your tax file number (TFN) to Smartsave Member's Choice Superannuation Master Plan to ensure the correct taxation is deducted from your contributions and earnings in the Fund, or to ensure your pension payments are taxed correctly
- ▶ consent to find your superannuation
- ▶ receive information from the fund electronically.

1. Current member details

Member number		Date of birth (DD/MM/YYYY)	
<input type="text"/>		<input type="text"/>	
Title	Given name(s)		
<input type="text"/>	<input type="text"/>		
Surname			
<input type="text"/>			
Postal address			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Residential address (if same as postal address, write as above)			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Phone (home)	Phone (work)	Mobile	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Email			
<input type="text"/>			

☐ I authorise Smartsave Member's Choice Superannuation Master Plan

☐ to update my address and contact details if the details provided above differ to the details currently held.

2. TFN details

TFN	
<input type="text"/>	
Member signature	Date (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>

3. Consent to use TFN declaration

- ☐ I give permission to Smartsave Member's Choice Superannuation Master Plan to use my personal information provided (including TFN) to search for any superannuation money held by the ATO or other superannuation funds, to the extent the law allows. Smartsave Member's Choice Superannuation Master Plan will contact me and confirm the result of the search, as well as providing transfer documents.

TFN	
<input type="text"/>	
Member signature	Date (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>

Important information

Providing your TFN to the Trustee is optional, and prior to doing so, the Trustee is required to inform you of the following:

- ▶ the Superannuation Industry (Supervision) Act 1993 permits the Trustee to collect your TFN
- ▶ your TFN is confidential
- ▶ if you do provide your TFN, it will only be used for legal purposes. These include finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation payment to which you may be entitled, and providing information to the Commissioner of Taxation. These purposes may change in the future as a result of legislative changes.

However, we may provide your TFN to:

- ▶ the Trustee of any other superannuation fund, rollover fund or Retirement Saving Account to which your benefits are transferred in the future (unless you instruct us in writing not to do so)
- ▶ the Commissioner of Taxation.

Your TFN will not be disclosed to anyone else.

Why your TFN is important

It is not an offence or compulsory if you do not provide the Trustee of Smartsave Member's Choice Superannuation Master Plan with your TFN. However, doing so will ensure:

- ▶ Smartsave Member's Choice Superannuation Master Plan can accept all types of contributions to your Member account
- ▶ the tax on contributions will not increase
- ▶ other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- ▶ it's much easier to trace different superannuation accounts in your name so that you receive all of your superannuation when you retire
- ▶ your TFN can be provided to a superannuation fund receiving any benefits you may transfer
- ▶ other than tax that normally applies, no additional tax will be deducted when you access your superannuation

Since 1 July 2007, if you complete a TFN declaration form for your employer, and a superannuation contribution is made on your behalf, the employer must give the superannuation fund your TFN within 14 days of receiving the declaration form. If a contribution has not been made in that period, the TFN may be passed on to the superannuation fund at the time the contribution is made.

Finding my lost and unclaimed superannuation and information on other superannuation held with other Funds

I understand that where Smartsave Member's Choice Superannuation Master Plan locates lost, unclaimed superannuation and information and other superannuation monies with other Funds, Smartsave Member's Choice Superannuation Master Plan or my nominated representative will contact me before processing any consolidation of my other superannuation accounts to Smartsave Member's Choice Superannuation Master Plan.

Please return completed and signed form to: Smartsave, PO Box 1282, Albury NSW 2640.

Privacy Policy

The collection of your personal information (PI) in this form is governed by the Privacy Act 1988 (Cth). Diversa Trustees Limited uses your PI to administer your superannuation account (including insurance (if any)), improve our products and services and keep you informed. If we cannot collect this information, we may not be able to do these tasks. We may collect your PI from you, or from third parties such as your employer. We will only share your PI where necessary to perform our activities with our administrator, other service providers, as required by law or court/tribunal order or with your permission. Your PI may be accessed overseas by some of our service providers. For full details of how we use your PI, the countries where your PI may be accessed, how you can access and change your PI, and the privacy complaints process please read our Privacy Policy at smartsavesuper.com.au or call us on 1300 654 720.

Contact us

Phone: 1300 654 720 | **Email:** smartsave@onevue.com.au | **Website:** smartsavesuper.com.au

Smartsave Employer Super and Smartsave Personal Choice and Smart Pensions are part of the Smartsave Member's Choice Superannuation Master Plan ABN 43 905 581 638 RSE R1001341 (Fund). Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153. RSE Licence L0000635 (Trustee) is the Trustee of the Fund and the product issuer. The information in this document has been prepared by OneVue Wealth Services Ltd ABN 70 120 380 627 AFSL 308868 as the Fund Promoter. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation or needs. Before making any financial decisions about Smartsave Employer Super and Smartsave Personal Choice & Smart Pensions, it is important that you read the current product disclosure statement (PDS) relevant to your membership and consider your particular circumstances and whether the particular financial product is right for you. The current PDS for each product is available on smartsavesuper.com.au. You should consult a financial adviser if you require personal advice.