



Superannuation Individual Tax File Number Notification via Fund Trustee or Employer

This form may only be used to pass on your tax file number to your superannuation fund.
(Please print neatly in **BLOCK LETTERS** with a black or blue pen only).

Fund Name: **SMF ELIGIBLE ROLLOVER FUND**

Fund Address: SMF Funds Management Ltd, GPO Box 529, Hobart Tasmania 7001

Fund Telephone No: (Freecall) 1800 677 306

Your Surname/Family Name:

Given Names: Date of Birth: / /

Membership Number: Sex: Male Female
(if known)

I agree to provide my Tax File Number:

My Tax File Number:

Signature: Date: / /

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. By 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 Eligible Termination Payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient information is available;
- passing your TFN to the Australian Taxation Office where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age; and
- allowing the trustee of your superannuation fund or Retirement Savings Account to provide your TFN to another superannuation provider receiving any benefits you may transfer. Your trustee won't pass your TFN to any other provider if you tell the trustee in writing that you don't want them to pass it on.
- allowing your superannuation provider to quote your TFN to the ATO when reporting details of contributions for the purposes of the Superannuation Contributions Tax (Surcharge).

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

- you may pay more tax on your superannuation benefits than you have to (you will 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; and
- the surcharge may apply to your superannuation contributions.

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 your fund or the ATO Superannuation Helpline (13 10 20).



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IMPORTANT NOTES TO TRUSTEES AND EMPLOYERS

- In the interests of your members/employees, you should make this form available to them.
- Please ensure that the member/employee is aware of your address and telephone number (see the space provided on the front of this form).
- The member's/employee's tax file number must be kept private and secure.

SPECIFIC NOTES FOR TRUSTEES

- **If a member provides you with his or her tax file number for superannuation purposes (eg. on this form), you must accept it and record it with member's details.**
- Unauthorised use of the tax file number may incur a penalty of 100 penalty units (currently \$10,000) and/or 2 years imprisonment.

SPECIFIC NOTES FOR EMPLOYERS

- **If an employee provides you with his or her tax file number for superannuation purposes (eg. on this form), you are required to pass it on with or before the next superannuation contribution you make for that employee** unless you receive it within 14 days (eg. 2 days) before that contribution in which case you have 14 days from receiving it to pass it on to the employee's superannuation fund.
- 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 only 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.