

Tax File Number form

You should ensure that you provide your TFN to NCSF by completing this form. Superannuation legislation is always changing. However, as a NCSF member we keep you informed of any important changes that may affect you. From 1 July 2007, if you have not provided NCSF with your TFN, you will be taxed on your concessional contributions at the top marginal rate of 46.5% if your concessional contributions exceed \$1,000. Also, NCSF will be unable to accept non-concessional contributions if your TFN is not provided.

I hereby elect to advise my TFN and my number is:

<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"/>
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Member Number

First Name

Surname



Please return to: (No stamp required in Australia)
National Catholic Superannuation Fund
Reply Paid 180
Melbourne VIC 8060

In providing my Tax File Number I agree to all of the statements below:

I am aware that it is optional for me to provide my Tax File Number (TFN) and that the fund is authorised to seek my TFN under the Superannuation Industry (Supervision) Act 1993. The fund is required by law to properly safeguard it and only use it for lawfully approved superannuation and taxation purposes.

These lawful purposes include:

- Allowing the fund to search for and amalgamate ('match') any other benefits I may have in the Fund.
- Advising the Tax Office for taxation and Reasonable Benefit Limit purposes (not applicable from 1 July 2007).
- Advising the Tax Office when reporting details of contributions, to assist with its administration of the Superannuation Guarantee and the Government Co-Contribution for Low Income Earners.
- Allowing my TFN to be passed on to another regulated fund or Retirement Savings Account if my benefit is rolled over or transferred, unless I have requested in writing that my TFN not be passed on.
- Advising the Tax Office if no contributions are received for me for a period of 2 years and the Fund is unable to confirm my address. In these circumstances I will be assumed to be "lost" to the Fund.
- Advising the relevant State Government authority about my benefits if I do not claim my benefit after reaching age 65.

I am aware that failure to quote my TFN is not an offence. However, if I choose NOT to provide my TFN:

- Benefits paid to me will be subject to PAYG tax at the highest marginal rate, plus the Medicare levy. This may be recovered after lodgment of my tax return.
- My fund may not be able to locate other benefits for me in the Fund.
- From 1 July 2007, my fund will not be able to accept personal contributions from me, and certain other contributions may be subject to additional tax.

I am aware that the lawful purposes for which my TFN can be used, and the consequences of not quoting my TFN, may change as a result of future legislation. I am also aware that I can request, in writing, that the Fund not pass my TFN on to another fund.