legalsuper

Notice of intent to claim or vary a deduction for personal super contributions

COMPLETING THIS STATEMENT

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.
- Place X in ALL applicable boxes.

The instructions contain important information about completing this notice. Refer to them for more information about how to complete and lodge this notice.

HOW TO CLAIM A TAX DEDUCTION

Step 1 Complete the attached Notice of intent to claim a tax deduction for personal super contributions form.
This tells us the amount you want to claim.

Step 2 Receive confirmation from legalsuper.
Once we receive your form, we'll write to you confirming the amount you want to claim. The 15% contributions tax will then be deducted from your contributions and reported on your next member statement.

Step 3 Submit your tax return.
You will need to state the amount you want to claim as a tax deduction in the supplementary section of your tax return.

Section A: **Your details**

1 Tax file number (TFN)

The ATO does not collect this information provided on this form. This form is to assist you in providing details to your super fund. Under the *Superannuation Industry (Supervision) Act 1993,* your super fund is authorised to collect, use and disclose your TFN. Your super fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request your super fund, in writing, not to disclose your TFN to any other superannuation provider.

Declining to quote your TFN to your super fund is not an offence. However, giving your TFN to your super fund will have the following advantages:

- your super fund will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits; and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

For more information about your privacy please contact the entity you are providing this form to.

2 Name

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family name

First given name

Other given names

3 Date of birth Day / Month / Year

4 Current postal address

Suburb/town/locality

State/territory (Australia only)

Postcode (Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

Sensitive (when completed)

LEGS 8739

Section B: **Super fund's details**

6 Fund name

LEGALSUPER

7 Fund Australian business number (ABN) 60 346 078 879

8 Member account number

9 Unique Superannuation Identifier (USI) (if known) LIS0100AU

Section C: **Contribution details**

10 Personal contribution details

Is this notice varying an earlier notice? No ☐ Yes ☐

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.
If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

ORIGINAL NOTICE TO CLAIM A TAX DEDUCTION

11 Financial year ended 30 June 20

12 My personal contributions to this fund in the above financial year $, ·

13 The amount of these personal contributions I will be claiming as a tax deduction $, ·

Section D: **Declaration**

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

INTENTION TO CLAIM A TAX DEDUCTION

Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

- *I intend to claim the personal contributions stated as a tax deduction*
- *I am a current member of the identified super fund*
- *the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions*
- *I have not included any of the contributions in an earlier valid notice.*

*I declare that I am lodging this notice at the earlier of **either**:*

- *before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, **or***
- *before the end of the income year following the year in which the contribution was made.*

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

Day / Month / Year

Send your completed notice to your super fund. Do not send it to the ATO. The information on this notice is for you and your super fund. The ATO doesn't collect this information; the ATO only provides a format for you to provide the information to your super fund.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20 ☐☐

15 My personal contributions to this fund in the above financial year $ ☐☐☐,☐☐☐.☐☐

16 The amount of these personal contributions claimed in my original notice of intent $ ☐☐☐,☐☐☐.☐☐

17 The amount of these personal contributions I will now be claiming as a tax deduction $ ☐☐☐,☐☐☐.☐☐

Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to **reduce** the amount stated in that notice.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that at the time of lodging this notice:

- *I intend to claim the personal contributions stated as a tax deduction*
- *I am a current member of the identified super fund*
- *the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.*

I declare that I wish to vary my previous valid notice for these contributions by ***reducing*** *the amount I advised in my previous notice and I confirm that either:*

- *I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged,* **or**
- *I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made,* **or**
- *the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.*

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

☐☐

Signature

Date

Day ☐☐ / Month ☐☐ / Year ☐☐☐☐

Send your completed notice to your super fund. Do not send it to the ATO. The information on this notice is for you and your super fund. The ATO doesn't collect this information; the ATO only provides a format for you to provide the information to your super fund.