Australian Government
Australian Taxation Office

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 ☒ 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.

Section A: **Your details**

1 Tax file number (TFN)

You don't have to provide your TFN to your super fund. However, if your super fund does not have your TFN, they cannot accept personal contributions. Your super fund will not accept this notice as valid if they cannot accept or are forced to return the contributions it applies 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)

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

6 Fund name

7 Fund Australian business number (ABN)

8 Member account number

Section C: **Contribution details**

9 Personal contribution details

Financial year ended 30 June 20

My personal contributions to this fund covered by this notice $, ·

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

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

Section D: **Declaration**

In signing one of the declarations on this form you should be aware that the law has changed to expand the administrative penalty provisions to include penalties for making false or misleading statements that do not result in a shortfall amount.

This may include making false or misleading statements to an entity other than the ATO if the statement is required or allowed to be made under tax law, for example, a notice of intent to deduct super contributions given to a super fund.

For more information about these penalties, refer to Superannuation and false or misleading statements which do not result in a shortfall amount at **http://www.ato.gov.au/content/00270103.htm**

Complete and sign one of the following statements that applies to you:

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 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 covered by this notice 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

OR

VARIATION OF PREVIOUS VALID DEDUCTION NOTICE

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.

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 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 covered by the notice 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 variation notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.