



Perpetual WealthFocus Super Plan (including Wholesale)

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315

Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

NOTICE OF INTENT TO CLAIM OR VARY A DEDUCTION FOR PERSONAL SUPER CONTRIBUTIONS

Section A: Your details

1. Tax file number (TFN)

We are authorised by law to collect your TFN. If you provide your TFN to us, we will use it only for authorised purposes, otherwise, your TFN will be treated as confidential. If you have previously provided your TFN we will continue to use it.

If you have not previously supplied your TFN you may quote your TFN. Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your TFN. However, if you do not, we are required to deduct additional tax from all concessional contributions made during the financial year immediately prior to the withdrawal. We are also required to deduct tax at the highest marginal tax rate plus Medicare Levy on the withdrawal. An exemption is not considered to be a TFN.

tax file number

2. Name

first name(s)

last name

date of birth

current postal address

suburb

state

postcode

country

daytime phone number (include area code)

Section B: Super fund's details

fund name

Perpetual WealthFocus Superannuation Fund

Fund Australian Business Number (ABN):

4 1 7 7 2 0 0 7 5 0 0

member account number

Section C: Contribution details

Personal contribution details

Financial year ended 30 June

My personal contributions to *this fund* covered by this notice:

\$

Is this notice varying an earlier notice? (tick)

no

yes

The amount of these eligible personal contributions I will be claiming as a tax deduction

\$

Section D: Declaration

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

INTENTION TO CLAIM A TAX DEDUCTION

Use this declaration if you have not previously lodged a notice with the fund for these contributions:

- I authorise Perpetual to quote my TFN to the Australian Taxation Office.
- I authorise a representative of Perpetual to obtain information from the Australian Taxation Office regarding pension account/s in relation to my TFN, PAYG or other superannuation tax-related matters.

I am lodging this notice before both of the following dates:

- the day that I lodged my income tax return for the year stated in section C; and
- the end of the income year after the year stated in section C.

At the time of completing this notice:

- I intend to claim the personal contributions stated in section C as a tax deduction.
- I am a member of the fund stated in section B
- my super fund stated in section B still holds these contributions
- this super fund has not begun to pay a superannuation income stream based in whole or in part on these contributions,
- I have not included these contributions in an earlier notice, and

The information given on this notice is correct and complete

first name(s)																								
last name																								
signature																	date		/		/			

OR

VARIATION OF PREVIOUS DEDUCTION NOTICE

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

I intend to claim the personal contributions stated in section C as a tax deduction.

I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice

- I authorise Perpetual to quote my TFN to the Australian Taxation Office.
- I authorise a representative of Perpetual to obtain information from the Australian Taxation Office regarding pension account/s in relation to my TFN, PAYG or other superannuation tax-related matters.

I confirm that either:

- 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 the contribution was made, or
- the Tax Office has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.

The information given on this notice is correct and complete

first name(s)																								
last name																								
signature																	date		/		/			