



**BT Lifetime – Personal Super
 BT Retirement Selection – Personal Super
 BT Classic Lifetime – Personal Super
 BT Superannuation Investment Fund
 BT Superannuation Savings Fund
 Tax File Number**

BT Customer Relations ☎ 132 135 (8.00am–6.30pm Mon–Fri Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090 is the Trustee of BT Lifetime – Personal Super ABN 83 953 436 008 RSE R1003864 and BT Retirement Selection – Personal Super Plan ABN 39 827 542 991 RSE R1001327

BT Funds Management No. 2 Limited ABN 22 000 727 659 AFSL 233720 RSE L0001076 is the Trustee of BT Classic Lifetime – Personal Super ABN 68 324 870 141 RSE R1003925

Westpac Securities Administration Limited ABN 77 000 049 472 AFSL 233731 RSE L0001083 is the Trustee of BT Superannuation Investment Fund ABN 29 769 424 728 R1003956 and BT Superannuation Savings Fund ABN 83 835 373 437 RSE R1003963

The Superannuation Industry (Supervision) Act 1993 authorises the Trustee to request Tax File Numbers (TFNs) from members in the plan.

This legislation also requires your employer to pass your TFN to BT if you have given it to them for superannuation purposes.

Complete this form using **black pen** – print in clear **CAPITAL LETTERS**

1. INVESTOR DETAILS

Investor number

C

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Tax file number

! Note: If a valid TFN is not provided, contributions will not be accepted.

Due to Government legislation, we are unable to accept non-concessional contributions (generally contributions made by you, or on your behalf, other than employer contributions) if you have not provided us with your TFN. The Trustee has further determined that we will not accept any contributions made by you or on your behalf unless your TFN has been provided to us.

Before providing your TFN to the Trustee, the Trustee is required to tell you the following:

- the Trustee is authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993
- withholding your TFN is not an offence. However, if you do not supply it you may be subject to more tax than you would otherwise pay on your contribution and the payments you receive from BT Super. This excess tax may be reclaimed through the assessment process. Furthermore, without your TFN it may be more difficult to locate your benefit
- your TFN will be used for legal purposes only. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on superannuation payments and providing information to the ATO to enable it, amongst other things, to calculate the surcharge payable, if any. These purposes may change in the future
- if you provide your TFN, it may be provided to another superannuation plan or retirement savings account provider that receives any transferred benefits in the future unless you notify the Trustee in writing not to forward the TFN and may also be given to the ATO
- apart from these uses, your TFN will be kept confidential.

Signature of **Investor**

Date

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You can submit this form by:

- mail BT Financial Group
GPO Box 2675, Sydney NSW 2001
- fax (02) 9274 5780



02-30-050-01