

Authorisation for ATO declaration

Inactive low-balance accounts

How to complete this form

When to use the form?

You should complete this form if you have an inactive low-balance account and want this account to remain with AustralianSuper.

If your inactive low-balance account remains with AustralianSuper, your retirement savings will continue to be subject to fees and charges.

By authorising AustralianSuper to provide a written declaration to the Australian Taxation Office (ATO), your inactive low-balance account will stay with AustralianSuper and the ATO cannot consolidate this account on your behalf.

Once AustralianSuper receives this form, we will notify the ATO that you are not a member of an inactive low-balance account.

Things you should know

AustralianSuper needs to receive this form 30 days before the statement dates. These are the dates we are required to report and transfer your account/s to the ATO. These transfers take place on either 31 October or 30 April of each year.

Your authorisation for AustralianSuper to provide a written notice on your behalf declaring that you are not a member of an inactive low-balance account (as defined by the ATO) is only valid for 16 months. This means that if your account meets the definition of an inactive low-balance account in the future, and you don't want this account transferred to the ATO, you'll need to complete this form again.

If you require advice on how to manage your super visit australiansuper.com/advice

About the form

There are three sections to the form. You'll need to complete all sections.

Section A asks you to provide us with your personal details.

Section B asks you to provide details your account/s for which you are authorising AustralianSuper to provide a written declaration to the ATO on your behalf.

If you have more than three inactive low-balance accounts, which you want to remain with AustralianSuper, you'll need to complete more than one form.

Section C provides a declaration that you are not a member of an inactive low-balance account and the authority for AustralianSuper to act on your behalf for the purposes of giving the ATO a written notice to that effect.

You should check that all of the details you have provided are complete and correct before you sign and date the form.

When completing this form

- Complete using blue or black pen
- Print clearly in block letters
- Place an X in the relevant box if authorising your fund to act on your behalf.



Need help?

If you have any questions about this form, or are having trouble completing the form, call us on **1300 300 273** and we can help.

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Use this form if you choose to authorise AustralianSuper to notify the Commissioner of the ATO that you want this account to remain with AustralianSuper and not be transferred to the ATO.

Please complete in pen using CAPITAL letters and print to mark boxes. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

SECTION A. YOUR DETAILS

Last name

Mr Ms Mrs Miss Dr

First name

Other given name/s

Date of birth

TFN

! For how we use your TFN, go to australiansuper.com/RefTFN. If you don't provide your TFN you're likely to pay more tax than you need to.

Street address

Suburb

State

Postcode

Please tick here if postal address is same as residential address

Postal address

Suburb

State

Postcode

Country if outside Australia

How can we contact you or leave a message if we need more information?

A preferred contact number must be provided.

(Country code) (Area code) (Phone number)

Email

SECTION B. SUPERANNUATION FUND DETAILS

Details of your super account

These details should be on your annual statement, online account or on our mobile app.

Fund name

A U S T R A L I A N S U P E R

Fund (ABN)

6 5 7 1 4 3 9 4 8 9 8

Member name

Account 1

Unique Superannuation Identifier (USI)

Your member number

Account 2 (if applicable)

Unique Superannuation Identifier (USI)

Your member number

Account 3 (if applicable)

Unique Superannuation Identifier (USI)

Your member number

SECTION C. AUTHORISATION

I declare that I am not a member of an inactive low-balance account and authorise AustralianSuper to act on my behalf in giving a written notice to this effect to the Commissioner.

I have read the Privacy Collection Statement as set out on page 4 of this form, and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.

I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).

If I've provided my email address and/or phone number, I consent to AustralianSuper sending me information about my account, AustralianSuper's products and services and marketing communications, including third-party products and services, via email, my online account, SMS, mobile app or phone, as appropriate and in accordance with AustralianSuper's Privacy Policy and my existing communication preferences. I understand I can change my communication preferences at any time by calling AustralianSuper on 1300 300 273 or through the My communication preferences section of my online account.

At australiansuper.com/privacy I can read the full details on the collection and use of personal information.

Sign here:



Date

D D M M Y Y Y Y

Print full name

Privacy Collection Statement

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria 3001, collects your personal information (PI) to operate your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties like your employer. We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, Link Group), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. A list of countries can be found at the URL below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details go to australiansuper.com/privacy or call us on 1300 300 273.