

Authorisation for ATO declaration

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 costs.

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 of 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 give 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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