



Tax File Number Collection Form

This form is used to advise us of your Tax File Number. **Please read the Important Information before completing.**

Your Full Name:

Your Member Number:

Your Address:

Your Email Address:

Your Date Of Birth:

1. Important Information

You or your employer may already have provided your Tax File Number (TFN) to the Fund. If not, we are required to tell you the following details before you provide your TFN. Your TFN is confidential, and you should know the following before you decide to provide it to us:

- The Trustee is authorised to collect your TFN under the Taxation and Superannuation Laws.
- If you do provide your TFN to us, we will only use it for legal purposes. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any Eligible Termination Payment (ETP) you may be entitled to, and providing information to the Commissioner of Tax such as reporting details of contributions for the purposes of the superannuation surcharge.
- If you do provide your TFN to us, we may provide it to the Trustee of another superannuation fund or a Retirement Savings Account (RSA) provider where the Trustee or RSA provider is to receive your transferred benefits in the future.
- We will not pass your TFN to any other fund if you tell us in writing that you do not want us to pass it on.
- We may quote your TFN to the Australian Taxation Office (ATO) when reporting details of contributions.

Otherwise your TFN will be treated as confidential. You are not required to provide your TFN. Declining to quote your TFN is not an offence. However, if you do not give us your TFN, either now or later:

- You may pay more tax on your benefits than you have to (you may get this back at the end of the financial year in your income tax assessment).
- It may be difficult to locate or amalgamate your superannuation benefits in the future.

The purposes for which we can use your TFN and the consequences of not providing it to us may change in the future as a result of changes to the law.

Your Privacy

The information you provide in this form is collected by and held for the Southern Cross Super Plan by the Fund Administrator in accordance with the Privacy and Personal Information Protection Act 1998, under which you have rights of access and correction. Information you provide may be disclosed to lawfully authorised government agencies. For further information about Privacy, please contact the Fund Administrator whose contact details can be found on the bottom of this form.

2. Your Tax File Number

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For more information about your TFN contact the ATO Superannuation Hotline on 13 10 20.

3. Your Authorisation

By signing this form, you confirm that you have read the Important Information about your Tax File Number and consent to providing your TFN for the legal purposes stated.

Member's Signature:

Date: