

Notice of Intent to Claim a Tax Deduction



Complete this form if you've made a personal contribution to your super account and wish to claim a tax deduction.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Before you start

- You must complete and return this form by the earlier of either:
 - before the day you lodge your tax return for the year in which you made the contributions
 - before the end of the financial year following the one in which you made the contributions
- Before you can claim the deduction on your tax return, you must receive a written acknowledgment from us confirming we've received your notice of intention to claim a tax deduction.
- In order to claim a deduction on your tax return:
 - at the time of lodging this notice, TelstraSuper must hold the contributions that you wish to claim as a tax deduction and must not have begun to pay an income stream based, in whole or in part, on these contributions, and
 - TelstraSuper must continue to hold these contributions until you receive a written acknowledgment from us confirming we have received your notice of intention to claim a tax deduction.
- Certain contributions cannot be claimed as a tax deduction, including re-contributions of amounts received as a COVID-19 early release of super payment, rolled over super benefits and salary sacrificed amounts.
- If you've made a withdrawal from your account or a roll out to another super fund after making personal contributions, you can only claim a deduction up to the amount of the personal contribution remaining in your account.
- Any contributions for which you claim a tax deduction will count towards your pre-tax (concessional) contribution limit.
- Do not complete this form if you have previously notified us of your intention to claim a tax deduction and you now wish to make a variation to that previous notification. In this situation you must complete a 'Notice of intent to claim or vary a deduction for personal super contributions' form (NAT 71121) issued by the Australian Taxation Office (ATO) and send it back to us. Visit www.ato.gov.au to obtain this form.
- If you're signing this form on behalf of another person, you will need to complete and attach an **Authorised Third Party Representative Identification** form available at telstrasuper.com.au/forms and include any certified documents as required

1. Your details currently held by TelstraSuper

Title Mr Mrs Miss Ms Other

Surname* Member number*

Given name(s)* Date of birth*

Residential address*

Suburb* State* Postcode*

Mobile/contact no.* Email*

* Mandatory fields

Note: We'll be unable to process this form if your contact or personal details are different to those we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on **1300 033 166**, or
- complete a **Change of contact details** form to update your contact details or a **Change of member details** form to update your personal details available at telstrasuper.com.au/forms and submit it with this form.

YOUR
BASIC
INFO



Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

2. Contribution details

Financial year ended 30 June 20

The total amount of personal contributions to my account in the above financial year \$

The amount of these personal contributions I wish to claim as a tax deduction \$

3. Your signature and declaration

I declare that:

- I'm lodging this notice at the earlier of either:
 - before the day that I lodge my income tax return for the year stated above, or
 - before the end of the financial year following the year stated above
- TelstraSuper currently holds these contributions and has not begun to pay an income stream based, in whole or part, on these contributions
- I have not included these contributions in an earlier notice
- The information given on this form is complete and correct.
- I understand that if the details on the form differ from the details that TelstraSuper holds about me this form will not be processed and TelstraSuper will not be responsible for delays or other consequences due to the details not matching.

Each person who signs this form as a guardian, administrator or attorney for the applicant named in this form represents and warrants by signing this form that he or she has been lawfully appointed as guardian, administrator or attorney (as the case may be) for the applicant and that appointment remains valid and current at the date hereof and has not been revoked.

Signature

X

Date

State capacity (if applicable)

Guardian

Administrator

Attorney



Please return completed form to TelstraSuper:

PO Box 14309, MELBOURNE VIC 8001 or email contact@telstrasuper.com.au

Instructions for completing this form

Before sending this form to TelstraSuper, please check that you have:

- ☒ read and completed the form in its entirety.

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709, is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper).
Telephone 1300 033 166 Website telstrasuper.com.au

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth). For further information on privacy visit our website at telstrasuper.com.au to download a copy of our Privacy Policy and Privacy Collection Statement.

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