



# Perpetual MySuper Perpetual Select Super Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315 RSE R1057034  
Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034  
MySuper product authorisation number 51068260563643

## NOTICE OF INTENT TO CLAIM OR VARY A DEDUCTION FOR PERSONAL SUPER CONTRIBUTIONS

Please complete all pages of this form in black ink using BLOCK letters if you wish to claim or vary a tax deduction for personal contributions you made during the financial year to either your Perpetual Select Super Plan (Super Plan) OR Perpetual MySuper (MySuper) account.

### Section A: Your details

#### 1. Tax file number (TFN)

We are authorised to request your personal details, including your TFN, under the *Superannuation Industry (Supervision) Act 1993*. You are not required to provide your TFN. However if you do not and we do not already hold your TFN, we are not able to accept the contribution(s) covered by this notice.

TFN	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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#### 2. Name

title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	other	<input type="text"/>
first name(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
last name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
date of birth	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	phone (business hours)	<input type="text"/>	<input type="text"/>
current postal address	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
suburb	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	state	<input type="text"/>	postcode
country	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section B: Super fund's details

fund name	Perpetual's Select Superannuation Fund										
fund Australian Business Number (ABN):	5	1	0	6	8	2	6	0	5	6	3
member account type	Super Plan <input type="checkbox"/>					MySuper <input type="checkbox"/>					
member account number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unique Superannuation Identifier (USI)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section C: Contribution details

#### Personal contribution details

financial year ended 30 June	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
my personal contributions to <i>this fund</i> covered by this notice:	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>
is this notice varying an earlier notice? (tick)	no	<input type="checkbox"/>	yes	<input type="checkbox"/>				
if varying an earlier notice, the amount of these eligible personal contributions claimed in my original notice	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>
the amount of these eligible personal contributions I will be claiming as a tax deduction	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>

## Section D: Declaration

Complete and sign one of the following statements that applies to you. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

### INTENTION TO CLAIM A TAX DEDUCTION

**Use this declaration if you have not previously lodged a notice with the fund for these contributions.**

I declare that at the time of lodging this notice:

- I authorise Perpetual to quote my TFN to the Australian Taxation Office
- I authorise a representative of Perpetual to obtain information from the Australian Taxation Office regarding pension account/s in relation to my TFN, PAYG or other superannuation tax-related matters
- I am lodging this notice before both of the following dates:
  - the end of the day that I lodged my income tax return for the year stated in section C
  - the end of the income year after the year stated in section C.
- At the time of completing this notice:
  - I intend to claim the personal contributions stated in section C as a tax deduction.
  - I am a current member of the fund stated in section B
  - my super fund stated in section B still holds these contributions
  - this super fund has not begun to pay a superannuation income stream based in whole or in part on these contributions
  - I have not included these contributions in an earlier valid notice.

The information given on this notice is correct and complete.

first name(s)	
last name	
signature	date <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>

or

### VARIATION OF PREVIOUS DEDUCTION NOTICE

**Use this declaration if you have already lodged a notice with your fund for these contributions and you wish to reduce the amount stated in that notice.**

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated in section C as a tax deduction
- I am a current member of the fund stated in section B
- My super fund stated in section B still holds these contributions and has not begun to pay a superannuation income stream based in whole or in part on these contributions
- I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice
- I authorise Perpetual to quote my TFN to the Australian Taxation Office
- I authorise a representative of Perpetual to obtain information from the Australian Taxation Office regarding pension account/s in relation to my TFN, PAYG or other superannuation tax-related matters
- I confirm that either:
  - I have lodged my income tax return for the year stated in section C, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or
  - I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year the contribution was made, or
  - the Tax Office has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

The information given on this notice is correct and complete.

first name(s)	
last name	
signature	date <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>