

Superannuation

Notice of intent to claim or vary a deduction for personal super contributions



Please use **BLACK** pen and **BLOCK** letters.

This form may be used to submit your intent to claim a tax deduction to the Netwealth Superannuation Master Fund ABN 94 573 747 704 (**the Fund**), or to vary a previous valid notice by reducing the amount you previously stated.

More information on the conditions which must be met to claim or vary a deduction are available on www.ato.gov.au (search for 'claiming deductions for personal super contributions').

This transaction may be available online. The offline transaction fee may apply if you choose to undertake this transaction offline using this form. If you do not currently have online access to your Netwealth account, you can contact your adviser to arrange the transaction or arrange online access using a 'Change of details' form available from our website.

! You should read the current Product Disclosure Statement (**PDS**) for the product in which your account is held as there may have been changes to the terms and conditions governing this transaction. The current PDS is available on our website.

Please consult your adviser or a tax professional if you are unsure on any of the information provided below or whether you are eligible to make a claim or vary a previous valid notice. Alternatively, please contact Netwealth.

Step 1. Provide member details

Client name	<div></div>																															
Client number	<div></div>										Account number	<div></div>																				
Date of birth	<div></div> / <div></div> / <div></div>																															
Postal address	<div></div>																															
Suburb/town	<div></div>																															
State	<div></div>					Postcode	<div></div>					Country (if not Australia)	<div></div>																			
Phone	<div></div>																															
Tax file number	<div></div>					-	<div></div>					-	<div></div>																			

! Netwealth is authorised to request your personal details, including your TFN, under the *Superannuation Industry (Supervision) Act 1993*, the *Income Tax Assessment Act 1997* and the *Taxation Administration Act 1953*. It is not an offence not to provide your TFN. However, if you do not provide your TFN, and Netwealth doesn't already hold your TFN, we are not permitted to accept the contribution(s) covered by this notice. For more information about your privacy please contact us.

Step 2. Personal contribution details

Is this notice varying an earlier notice? ☐ No ☐ Yes

If you answered 'No' complete **Step 3: Original Notice – Intent to claim a tax deduction** below, and sign Step 5.

If you answered 'Yes' complete **Step 4: Variation of previous valid notice of intent** below, and sign Step 5.

Step 3. Original Notice – Intent to claim a tax deduction



Complete this Step if you have not previously lodged a valid notice with Netwealth for these contributions.

Financial year ended 30 June 20

Y	Y
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My personal contributions to the Fund in the above financial year

\$,			.	0	0
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The amount of these personal contributions I will be claiming as a tax deduction

\$,			.	0	0
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Important note

The following statements are true and form part of my declaration when I sign this form:

I declare that at the time of lodging this notice:

- I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice before the earlier of the following dates:

- before the end of the day that I lodge my income tax return for the financial year in which the personal contributions were made; and
- before the end of the financial year immediately following the financial year in which the personal contributions were made.

Step 4. Variation of previous valid notice of intent



Complete this Step if you have already lodged a valid notice with Netwealth for these contributions and you wish to reduce the amount stated in that notice.

Financial year ended 30 June 20

Y	Y
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My personal contributions to the Fund in the above financial year

\$,			.	0	0
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The amount of these personal contributions claimed in my original notice of intent

\$,			.	0	0
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The amount of these personal contributions I will now be claiming as a tax deduction

\$, .

Important note

The following statement is true and forms part of my declaration when I sign this form:

I declare that I wish to vary (reduce) the amount I advised in my previous valid notice for these contributions, and I confirm that either:

- I have not yet lodged my income tax return for the above financial year with the Australian Taxation Office ('ATO') and this variation notice is being submitted to Netwealth on or before 30 June in the financial year immediately following the year in which the personal contributions were made; or
- I have lodged my income tax return for the above financial year with the ATO prior to the end of the following financial year, and this variation notice is being submitted to Netwealth before the end of the day on which the income tax return was lodged with the ATO; or
- the ATO has disallowed my claim for a tax deduction for personal contributions for the above financial year and this notice to Netwealth reduces the amount stated in my previous valid notice by the amount that has been disallowed.

Step 5. Declaration by member

By submitting this notice, I declare that:

1. At the time of lodging this notice:
 - a) I intend to claim the personal contributions stated as a tax deduction;
 - b) I am a current member of the Fund;
 - c) the Fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions;
2. I confirm my instructions and declarations above and I represent to Netwealth that all the details in this notice are true, correct, and complete;
3. I acknowledge that submitting this notice does not guarantee Netwealth will accept my notice;
4. I acknowledge I must not claim a deduction via my Personal Income Tax Return until I have received an acknowledgement letter from Netwealth;
5. I acknowledge there is no guarantee that my claim for a deduction for my personal contributions in my Personal Income Tax Return will be allowed by the ATO;

- Name _____

[illegible]

Signature

Date / /

Step 6. Declaration by adviser (to be completed by an Adviser Representative providing instructions on behalf of the client)

1. I am the nominated Adviser Representative for this client, my appointment has not been revoked and the client has directed and authorised me to submit this notice as the client's agent and to provide personal information about the client to Netwealth and make the declarations above and below on behalf of the client;
2. At the time of lodging this notice, the client:
 - a) intends to claim the personal contributions stated as a tax deduction;
 - b) is a current member of the Fund;
 - c) the Fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions;
3. I confirm the instructions and declarations above and I represent to Netwealth that all the details in this notice are true, correct, and complete;
4. I acknowledge that submitting this notice does not guarantee Netwealth will accept this notice;
5. I have notified the client that they must not claim a deduction via their Personal Income Tax Return until they have received an acknowledgement letter from Netwealth;
6. I acknowledge there is no guarantee that the client's claim for a deduction for personal contributions in their Personal Income Tax Return will be allowed by the ATO;
7. I acknowledge that providing false or misleading information in this notice, or failing to take reasonable care, may result in the ATO imposing an administrative penalty; and
8. I acknowledge that this request is governed by the terms and conditions for such transactions as set out in the current PDS, Information Guides, and any Supplementary Product Disclosure Statement for the Fund.



Adviser Representative

[illegible]

Signature

Date / /

Step 7. Once complete please send to us

Send to us:



contact@netwealth.com.au



Netwealth Superannuation Master Fund, Reply Paid 336, South Melbourne VIC 3205



Activities & Tasks > Document Upload > Other (Advisers only)

For more information:



netwealth.com.au



1800 888 223



Your adviser