

Notice of Intent to claim personal super contributions

If you make a personal (after-tax) contribution to your super, you may be able to apply to claim a tax deduction on some or all of these amounts. This could reduce the amount of tax you pay for the year.

How to apply to claim a tax deduction

- 1. At the end of the financial year, complete this form and send it back to PSSap or ADF Super.
- 2. We will write back to you confirming your claim has been processed.
- 3. Use this information to lodge your income tax return.

If you prefer, you can use the <u>ATO Notice of Intent to claim or vary a tax deduction form</u> available at **ato.gov.au**.



Please don't complete both forms.

When to apply

You can claim a tax deduction, provided you complete this form and receive a written response from us before you submit your tax return for the relevant year. We must have received your form by the earlier of either:

- the day you lodge your tax return for the year in which you made the contributions; or
- the end of the income year following the year in which you made the contributions.

Example:

Julie contributes \$5,000 to her super Claim form to PSSap/ADFSuper Her tax return

30 April 1 July 30 June

Julie must submit her claim for a tax deduction before the earlier of lodging her tax return and 30 June of the following financial year in which the personal contributions were made.

Am I eligible to claim a tax deduction?

You can claim a tax deduction for your personal contributions if:

- you have not opened an account-based pension using part or all of the contributions for which you intend to claim a tax deduction; and
- you're a member of PSSap or ADF Super and your contributions are still in your super account.



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Notes continued on next page

Any financial product advice provided in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation and needs. You may wish to consult a licensed financial adviser. Before making any decision in relative to a scheme or financial product referred to in this document, you should obtain a copy of the Product Disclosure Statement for that scheme or product.

Commonwealth Superannuation Corporation (CSC) ABN: 48 882 817 243, AFSL: 238069, RSEL: L0001397

Australian Defence Force Superannuation ABN: 90 302 247 344 RSE: R1077063

Can I change the amount I wish to claim as a tax deduction?

Yes. You'll need to complete section C of this *Notice of intent to claim a tax deduction for personal super contributions form* to reduce the amount claimed on your previous notice. If you don't want to claim any of your personal contributions, you'll need to reduce your claim amount to zero. Alternatively, you may want to provide a second notice specifying the additional amount you want to claim.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Ensure that all boxes are filled out with correct information.

Submitting your form

Please email or post your completed form to:

PSSap ADF Super
Locked Bag 20117, Locked Bag 20116,
Melbourne VIC 3001 Melbourne VIC 3001

formsandapplications@pssap.com.au formsandapplications@adfsuper.gov.au

Do you need financial advice?

Obtaining professional advice from an experienced financial planner can help you reach your financial goals. CSC's authorised financial planners* provide 'fee for service' advice, which means you receive a fixed quote upfront. There are no obligations, commissions or hidden fees. To arrange an initial advice appointment please call 1300 277 777 during business hours.

Privacy

We're committed to protecting your privacy. We collect your personal information for the purposes of providing superannuation services to you, improving our products and to keep you informed. We will only share your personal information where necessary for providing superannuation services to you. This may include disclosing your personal information to our scheme administrator, service providers or government or regulatory bodies. Your personal information may be accessed overseas by our service providers. Please see our privacy policy for full details. Your personal information will not be otherwise used or disclosed unless required or permitted under law. A full copy of our privacy policy as well as the privacy complaint process is available at csc.gov.au

*Our authorised
financial planners are
authorised to provide advice
by Guideway Financial Services
(ABN 46 146 498 538, AFSL 420367).
Guideway is a licensed financial
services business providing CSC
financial planners with support
to provide members with
specialist advice, education
and strategies.





Provide your personal details

I am a member of: PSSap		ADI	F Su	per																			
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If you wish to withdraw or reverse an original tax deduction notice you must reduce the claim amount to zero $\frac{1}{2}$

in this section.



Making a partial claim

If you transfer some of your super out or take part of it in cash, you may still be able to claim a partial tax deduction for the personal contributions that are left in your super account. Getting financial advice before you transfer any of your super may help you make the most of the tax benefits available. For further assistance, contact the Australian Taxation Office or a professional tax adviser.



Member Declaration

Please read the information below carefully before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, the ATO may impose an administrative penalty.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction;
- I am a current member of PSSap/ADF Super;
- PSSap and ADF Super currently holds these contributions and has not begun to pay a super income stream based in whole or part on these contributions; and
- The information I have given in this notice is correct and complete.

For an original notice of intent to claim a tax deduction

- I have not included any of the contributions in an earlier valid notice; and
- I declare that I am lodging this notice at the earlier of either:
 - The day that I lodged my income tax return for the same financial year in which the personal contributions were made, or
 - Before the end of the following financial year in which the contribution was made.

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Submit your form

Please email or post your completed form to:



PSSap Locked Bag 20117, Melbourne VIC 3001

formsandapplications@pssap.com.au



ADF Super Locked Bag 20116, Melbourne VIC 3001

formsandapplications@adfsuper.gov.au

Once we have received your form, we will send you a response. Once you receive our response, you can then complete your income tax return.

You may need your fund details for your income tax return:

PSSap

Australian Business Number (ABN): 65 127 917 725 Unique Superannuation Identifier (USI): 65127917725001

ADF Super

Australian Business Number (ABN): 90 302 247 344 Unique Superannuation Identifier (USI): 90302247344001

End form