

ANZ Super Advantage, Superannuation Savings Account and ANZ Traditional Products

Tax file number notification form



12 March 2014

Customer Services

Phone 13 38 63

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Email customer@onepath.com.au

Website anz.com

INSTRUCTIONS

- Please complete and sign this form and return to:
ANZ Super, GPO Box 4028, Sydney NSW 2001

1. MEMBER DETAILS

Member number

Product ANZ Super Advantage Superannuation Savings Account ANZ Traditional Products

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s)

Date of birth (dd/mm/yyyy)

Residential address (this cannot be a PO box) State Postcode

Contact phone

My tax file number is - -

2. PROVIDING YOUR TAX FILE NUMBER (TFN)

We are authorised to collect your TFN under taxation and superannuation laws and will treat your TFN as confidential. If you do decide to provide your TFN we:

- will only use it for legal purposes including facilitating the consolidation of your super accounts within our fund, finding or identifying your super benefits, providing other relevant information and receiving the results associated with searching the Lost Member Register, Super Guarantee, calculating tax on any contributions or payments you may be entitled to and providing information to the ATO, such as reporting details of contributions for the purposes of the government co-contribution, lost member reporting and monitoring of contributions caps
- may provide your TFN to the trustee of another super fund or retirement savings account provider where the trustee or provider is to receive your transferred benefits in the future
- will not pass your TFN to another fund if you tell us in writing that you do not want us to pass it on.

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:

- we may not be able to accept member contributions, and you may be liable to pay additional tax on concessional contributions
- 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.

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SuperMatch

SuperMatch is a service the ATO provides to super funds which allows them to use a member's TFN to search various databases, including the lost members register, so that members may be 'matched' with their super benefits.

We may conduct this search process on behalf of members. If we match a member with their missing benefits, we may advise you and offer to consolidate your benefits within your ANZ superannuation account. If you do not want us to undertake this free service on your behalf, please advise us in writing.

Privacy

By signing this form, I consent to the collection, use, storage and disclosure of my personal information (including health information) as described in the Privacy section of the PDS and ANZ's Privacy Policy which is available at anz.com/privacy, or by calling Customer Services. If information is provided about another person in this application, I declare that I have the consent of that person to do so. I understand that OnePath Custodians Pty Limited requires me to inform the person concerned that I have done so and direct them to the Privacy Policy which is located at anz.com/privacy

Signature of member (sign clearly within box)

Date (dd/mm/yyyy)