



Retirement Benefits Fund Board

GPO Box 446, Hobart Tas 7001

Telephone: 1800 622 631 or 03 6233 3672

Facsimile: 03 6233 3357

TAX DEDUCTIBLE CONTRIBUTIONS DEPOSIT & NOTIFICATION FORM

Use this form to make tax deductible contributions or to advise RBF of your intention to claim a tax deduction.

To claim superannuation contributions as a tax deduction, you need to satisfy certain criteria. Generally, eligibility to claim a tax deduction for superannuation contributions is restricted to individuals who receive less than 10% of their assessable income and reportable fringe benefits as an employee eligible for superannuation guarantee contributions. RBF does not take responsibility for ensuring your eligibility.

Where you notify RBF of your intention to claim a tax deduction, the contributions are subject to 15% Contributions Tax and will count towards your annual concessional contributions limit.

Member's Details

RBF Member No: Date of Birth:/...../.....
Full Name:
Postal Address:
Suburb State Postcode.....
Residential Address: As above
Suburb State Postcode.....
Occupation:
Business Name (if any):
Business Address:
Suburb State Postcode.....
ABN (if any)
Phone Numbers:
(Home) (Business) (Mobile)
Tax File Number: If you have already provided your Tax File Number, you do not need to supply it again.
.....

If you are an overseas resident

Country of residence:

Country of citizenship:

Notification of intention to claim a tax deduction

Complete this section if you wish to notify RBF that you intend to claim a tax deduction for contributions you have already made. It is important to only include amounts not already included in any other notice of intention to claim a tax deduction provided to RBF. The amount covered by this notification will be added to any similar notifications already received.

I wish to notify RBF of my intention to claim previous contributions to RBF as a tax deduction.

Amount of contributions I intend to claim as a tax deduction \$.....

You will need to sign the declaration over page to complete your notification to RBF.

Variation of previous deduction notice

Complete this section if you wish to reduce your previous claim to RBF for a tax deduction.

- I wish to vary my previous notice for contributions by **reducing** the amount I advised in a previous notice.
- I confirm that either:
- 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 reduced the amount stated in my previous notice by the amount that has been disallowed.

Reduced amount of contributions I will claim as a tax deduction \$.....

This declaration relates to contributions made in the financial year:

You will need to sign the declaration over page to complete your notification to RBF.

Make a contribution now for which I intend to claim a tax deduction

Complete this section if you wish to make a contribution or advise of a direct deposit or internet banking deposit for which you intend to claim a tax deduction.

- I wish to make a contribution and notify RBF I intend to claim it as a tax deduction

Declaration

You must satisfy one of the following criteria (please tick):

- I am under the age of 65
- I am age 65 or over, but under age 75, and have worked at least 40 hours in a continuous 30 day period in the current financial year.

Contribution details

Contribution amount: \$ Date/...../.....

- Method of contribution: In person @ RBF
 By mail
 Direct bank deposit
 Internet bank transfer

For direct bank deposits & internet transfers:

Please quote your member number and name in the transaction description on the bank deposit form or internet payment description. Failure to do so may incur bank administration charges. Please mail this form to RBF or fax 03 6233 3357 to ensure funds are allocated correctly to your account. Alternatively details of your deposit can be emailed to super@rbf.com.au.

RBF Business Account: BSB 037-001 Account No: 281958
Westpac Banking Corporation, Hobart Branch

Member Investment Choice

Member Investment Choice Option: \$..... or..... %

Member Investment Choice Option: \$..... or..... %

I acknowledge that unless I have already provided investment choice instructions or nominated an investment choice now, the deposit will be invested in the default Member Investment Choice option – RBF Actively Managed. I will access RBF's website or contact RBF directly if I require more information about Member Investment Choice.

Verifying your identity

Under Commonwealth legislation, RBF is now required to verify your identity before making a payment. If you have already provided a certified copy of documents to verify your full name, date of birth and current residential address you do not need to do so again.

Any one of the following is acceptable to verify your identity:

- Current driver's licence or other government issued card that includes your full name, date of birth, current residential address and photograph.
- Current passport that includes your full name, date of birth and photograph.
- Original birth certificate or birth extract showing your full name at your date of birth. If you have changed your name, you will need to provide certified copies of documents relating to your name change (eg marriage certificate). You will also need to provide evidence of your current residential address (eg a notice issued by a utilities provider or local government within the last 3 months).

Provide certified copies or show the original to an RBF staff member

Your documents can be certified by Australia Post, a Justice of the Peace or by most accountants, financial planners, lawyers and police officers. RBF must receive the original certified copy. Copies or facsimiles of the certified document are not acceptable. The person certifying the document will need to write on the copy that they have seen your original document. They must also sign and date the copy, write their name and the basis on which they are authorised to certify such documents.

If the certification is not completed correctly, RBF cannot verify your identity in accordance with the legislative requirements.

More information is available about correct certification and acceptable documents to verify your identity on the Forms & Publications area of RBF's website www.rbf.com.au.

Declaration

I have completed the appropriate section of this form to indicate:

- I intend to claim a tax deduction** for contributions made with this form or contributions made on a previous occasion.

I am lodging this notice before both the following dates:

- the day that I lodged my income tax return for the year stated above; and
- the end of the income year after the year stated above.

- I wish to vary my previous notice for contributions by **reducing** the amount I advised in a previous notice.

At the time of completing this notice:

- I intend to claim the personal contributions stated above as a tax deduction.
- RBF is not paying a superannuation income stream based in whole or part on these contributions.
- I have not included these contributions in any other notice of intention to claim a tax deduction provided to RBF.

- I understand that RBF is required to verify my identity before accepting this contribution.

- I have previously provided certified copies of documents to verify my full name, date of birth and current residential address.

- I have attached a **certified copy** of evidence to verify my full name, and either date of birth and current residential address.

Signature: **Date:**