

Tax File Number Notification



Important notice to all HOSTPLUS Executive members. Don't pay extra tax!

The Federal Government laws relating to superannuation tax and Tax File Numbers (TFNs) could result in you paying extra tax unnecessarily.

HOSTPLUS is authorised under the Superannuation Industry Supervision Act 1993 to ask for your TFN and we recommend that you provide it.

You are not obliged to provide your TFN and declining to do so is not an offence. However, if you don't provide your TFN:

- taxable contributions received for you by HOSTPLUS may be subject to the 10% superannuation surcharge tax (which may not have been payable if you

had provided your TFN to us). This is in addition to the 15% contributions tax that currently applies.

- benefits paid to you may be subject to tax at the highest marginal rate plus the Medicare Levy (this may be recovered after lodgment of your tax return).
- in the future, HOSTPLUS may not be able to locate and amalgamate multiple benefits that we may hold for you.

The consequences of not providing your TFN may change in the future as a result of changes to legislation.

You can provide your Tax File Number by

- Calling HOSTPLUS Executive on **1300 799 998**
- Completing and faxing this form to **1300 366 991**
- Completing and mailing this form to:
Locked Bag 969
Carlton South VIC 3053

If you elect to provide your TFN, HOSTPLUS is required by law to properly safeguard it and only use it for approved lawful purposes.

These purposes include:

- to assist in searching for and amalgamating your superannuation benefits in HOSTPLUS where other information is insufficient,
- to advise the Australian Taxation Office when a benefit is paid to you or if you have unclaimed superannuation money when you reach the Government's pension age,
- to calculate tax on any eligible termination payment to ensure that benefits paid to you are taxed at reduced rates, and
- to provide information to the Commissioner of Taxation to enable them to assess any surcharge payable on superannuation contributions made by or for you, and to ensure that you are not liable to pay the superannuation tax surcharge if it does not apply to you.

These purposes may change in the future.

If you provide your TFN, HOSTPLUS may also forward it to another regulated superannuation fund or retirement savings account (RSA) if your benefit is transferred or rolled over in the future (unless you request in writing for this not to be done). Otherwise, your TFN will be treated as confidential.



Consider providing your Tax File Number

I wish to provide my Tax File Number to HOSTPLUS

Surname

Given name/s

Membership number

My Tax File Number is:

Is this the first time you have provided your TFN to HOSTPLUS?

YES – please sign the declaration

NO – please attach documents to confirm your identification (see overleaf for details), and sign the declaration below.

Sign the declaration

By signing (below), I indicate my agreement to the use of my TFN as outlined above.

I consent to HOSTPLUS collecting, using, storing and disclosing the information supplied by me for the purposes of administering my membership in accordance with the HOSTPLUS Privacy Policy.

Your personal information will not be used or disclosed for any other purpose without your consent, except where required by law. You are able to gain access to this information. For more information on privacy or to obtain a copy of our privacy policy, visit www.hostplusexecutive.com.au or call us on **1300 799 998**.

Signature

Date

DD / MM / YY

Is this a change of Tax File Number?

If you have previously supplied your Tax File Number but now wish to advise a new TFN to HOSTPLUS, please attach a certified copy of one of the following as applicable:

- marriage certificate,
- deed poll,
- certificate to change name,
- divorce certificate, or
- ATO advice.

In addition to supplying one of the above, please also attach certified copies of any two of the following:

- Current bill (eg. power bill) showing your present address,
- Birth certificate,
- Bank statement,
- Marriage certificate (if not used already),
- Driver's licence, or
- Passport.

How to certify a copy of a document

Step 1 – make a copy of the original document.

Step 2 – take the copy and the original document to a person who is legally allowed to certify documents.

These people include:

- Bailiff
- Bank, building society or credit union officer (with at least five years' continuous service)
- Chiropractor
- Civil marriage celebrant
- Dentist
- Finance company officer (with at least five years' continuous service)
- Judge, chief executive officer, master, clerk registrar or deputy registrar of a court
- Justice of the peace
- Legal practitioner
- Magistrate
- Medical practitioner
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Member of the Institute of Engineers, Australia (with at least five years' continuous service)
- Nurse
- Officer of the Australian Defence Force
- Pharmacist
- Physiotherapist
- Police officer
- Psychologist
- Public servant (employed on a permanent basis by the Commonwealth, state/territory or local government – includes government authorities)
- Teacher (employed on a full time basis at a school or tertiary education institution)
- Veterinary surgeon.

Step 3 – ask the person who's certifying the document to do the following:

- Write on the copy 'this is a certified copy of the original'
- Sign and print his or her name
- Provide contact details.

IMPORTANT: PLEASE DON'T SEND ORIGINAL DOCUMENTS TO HOSTPLUS

If you have any questions

Call HOSTPLUS Executive on **1300 799 998** between 8am and 8pm weekdays, contact us by fax on **1300 366 991**, by e-mail to **info@mail.hostplusexecutive.com.au** or visit our website at **www.hostplusexecutive.com.au**

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