

# Tax file number notification form

- **Notifying of my tax file number (TFN)**
- **Providing consent to search for my superannuation**
- **Communicate with me electronically**

## Use this form to:

- Provide your TFN to Enterprise Plan to ensure the correct taxation is deducted from your contributions and earnings in the Fund.
- Consent to find your superannuation.
- To receive information from the fund electronically.

### 1 Current member details

Member number  -  Date of birth  /  /

Given name(s)  Surname

Address

State  Postcode  Phone number

Email

### 2 TFN details

TFN

Member signature  Date  /  /

### 3 Consent to use TFN declaration

- I give permission to Enterprise Plan to use my personal information provided (including TFN) to search for any superannuation money held by the ATO or other superannuation funds, to the extent the law allows. Enterprise Plan will contact me and confirm the result of the search, as well as providing transfer documents.

TFN

Member signature  Date  /  /

**Questions?** Contact us on 1800 816 575 or [service@supermanagers.com.au](mailto:service@supermanagers.com.au).

**Complete your details on the form, sign and return** to Enterprise Plan via **email** to [service@supermanagers.com.au](mailto:service@supermanagers.com.au) or **mail** to PO Box 1282 Albury NSW 2640

## Important information

Providing your TFN to the Trustee is optional, and prior to doing so, the Trustee is required to inform you of the following:

- the Superannuation Industry (Supervision) Act 1993 permits the Trustee to collect your TFN
- your TFN is confidential
- if you do provide your TFN, it will only be used for legal purposes. These include finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation payment to which you may be entitled, and providing information to the Commissioner of Taxation. These purposes may change in the future as a result of legislative changes.

However, we may provide your TFN to:

- the Trustee of any other superannuation fund, rollover fund or Retirement Saving Account to which your benefits are transferred in the future (unless you instruct us in writing not to do so)
- the Commissioner of Taxation.

**Your TFN will not be disclosed to anyone else.**

### Why your TFN is important

It is not an offence or compulsory if you do not provide the Trustee of Enterprise Plan with your TFN. However, doing so will ensure:

- Enterprise Plan can accept all types of contributions to your Member account
- the tax on contributions will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your super benefits
- it's much easier to trace different super accounts in your name so that you receive all of your super when you retire.

### Privacy Policy

The information you are providing in this form is subject to the Privacy Amendment (Private Sector) Act 2000. The Act sets out principles for dealing with personal information which includes standards for collection, storage, accuracy and use of information and for disclosure required by the Australian Tax Office as well as your right to access your personal information which we hold. Enterprise Plan has developed policies for complying with this legislation which you may view on request.

### Important information for Employers

From 1 July 2007, if an employee completes a TFN declaration form, and a super contribution is made for the employees, the employer must give the employees super fund their TFN within 14 days of receiving the declaration form. If a contribution has not been made in that period, the TFN may be passed on to the super fund at the time the contribution is made.

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### Finding my lost and unclaimed superannuation and information on other superannuation held with other Funds

I understand that where Enterprise Plan locates lost, unclaimed superannuation and information and other superannuation monies with other Funds, Enterprise Plan will contact me before processing any consolidation of my other super accounts to Enterprise Plan.

The information in this document has been prepared by OneVue Super Services Pty Ltd ABN (74 006 877 872), AFSL 246883 as the Fund Administrator. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation and needs. Before making any decisions regarding your benefits in **Enterprise Plan sub Fund of the Executive Super Fund** ABN 60 998 717 367 (the Fund) it is important that you consider the current Product Disclosure Statement (PDS) relevant to your category of membership having regard to your own situation and needs. Copies of the various PDS' are available on the Enterprise Plan's website [enterpriseplan.com.au](http://enterpriseplan.com.au). You should consult a licensed or authorised financial adviser if you require advice that takes into account your personal circumstances.