



# Tax File Number Notification Form

Please fill out this Form in capital letters using a black or blue pen.

## 1. PERSONAL DETAILS

Member number (if known)

Name  
Title  Mr  Mrs  Miss  Ms  Other

Surname  Given name(s)

Date of birth  Gender Female  Male

Address  
Street

Suburb  State  Postcode

## 2. PROVIDING YOUR TAX FILE NUMBER

The Superannuation Industry (Supervision) Act 1993 allows the trustee of a superannuation fund to collect your Tax File Number (TFN). Your TFN will be used for authorised purposes only. This includes finding and identifying your superannuation benefits, calculating tax on any benefit payments and providing information to the Australian Taxation Office (ATO) or other prescribed authority. These purposes may change in the future. It is not an offence if you do not provide your TFN but if we do not hold your TFN, the following may apply:

- your insurance cover could lapse as we are unable to accept personal contributions to pay for insurance and/or your contributions may not be enough to cover premiums due to the extra tax being applied to the contributions
- you will not be able to make personal or spouse contributions to your superannuation
- employer and salary sacrifice contributions will be taxed at the highest marginal tax rate plus the Medicare levy. Please refer to [www.ato.gov.au](http://www.ato.gov.au) for more information on income tax rates
- for pre 1 July 2007 members, concessional contributions of up to \$1,000 will be taxed at 15%. For concessional contributions in excess of \$1,000, the whole amount will be taxed at the highest marginal tax rate plus the Medicare levy
- locating all your superannuation benefits when you retire will be harder
- lump sum withdrawals will not be concessional tax.

If the TFN has not been provided to TAL and additional tax has been deducted, please contact us about claiming the tax back from the ATO. TAL will claim a refund of this tax from the ATO for current members who provide a valid TFN but only for the previous three years. This service is not extended to members who have previously left the Fund. We may also provide your TFN to another superannuation provider if your benefits are being transferred to that superannuation provider, unless you request in writing that it not be disclosed.

By completing and returning this Form, you agree to provide your TFN to the Trustee of your super fund:

My Tax File Number is

Signature

Date

### 3. PRIVACY

The way in which TAL collects, uses and discloses your personal and sensitive information is described in the TAL Privacy Policy available at [www.tal.com.au/Privacy-Policy](http://www.tal.com.au/Privacy-Policy) or on request.

### 4. CONTACT DETAILS

**Call 1300 209 088**

Monday to Friday 9.00am – 5.00pm (AEST/AEDT)

Email: [customerservice@tal.com.au](mailto:customerservice@tal.com.au)

Website: [www.tal.com.au](http://www.tal.com.au)

Please return your completed Form and any supporting paperwork to:

**TAL Life Limited**, GPO Box 5380, Sydney NSW 2001