

Notice of intent to claim or vary a tax deduction for after-tax super contributions



Save time, go online!

You can submit a form via your online account at unisuper.com.au. Select **Manage account > Manage your super > Notice of intent to claim a deduction for after-tax contributions**.

Use this form to claim a tax deduction for after-tax super contributions made to us or to change a previous notice you've sent us.

SETTING UP A NEW PENSION ACCOUNT WITH US?

Submit this form to us and have it processed before you set up your new pension account—otherwise we won't be able to process it.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, call **1800 331 685**.

SECTION 1 MEMBER DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required. All fields in Section 1 are mandatory. Please ensure you complete all fields.

UniSuper member number

If you're unsure of your member number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title

 Mr Mrs Ms Dr Professor Other

Surname

Given name

Date of birth (DD/MM/YYYY)

Daytime contact number

SECTION 2 THE FINANCIAL YEAR YOUR CLAIM RELATES TO

▶ In which financial year did you make the contributions you're claiming a deduction for (e.g. FY22-23)?

Financial year 20 –

If you also want to claim or vary a tax deduction for a different financial year, complete a separate *Notice of intent* form.



SECTION 3 TOTAL AFTER-TAX CONTRIBUTIONS YOU'VE MADE

➤ To find out the total after-tax contributions you made during the financial year you stated in SECTION 2, log in to your account at unisuper.com.au/login.

- For contributions made in the **current** financial year, go to: Overview > Check on your contributions > After-tax (Non-concessional contributions)
- For contributions made in a **previous** financial year:
 - Go to Transactions and use the date range search function, or
 - Go to Statements > Previous statements and select the relevant 30 June statement.

If you need help, call us on **1800 331 685**.

What's the total amount of after-tax contributions you've made to UniSuper during the financial year you stated in SECTION 2?

Total after-tax contributions

\$

If you have money in other super funds and want to claim a tax deduction on after-tax contributions with them too, you'll need to complete a separate form with each of those funds.

SECTION 4 THE AMOUNT YOU INTEND TO CLAIM

How much of the amount in SECTION 3 do you want to claim as a tax deduction (or, if you're changing a previous notice, how much do you now want to claim)?

After-tax contributions you intend to claim

\$

If the amount you want to claim as a tax deduction is not available (for example, due to a payment or rollover), UniSuper will process the maximum amount available. The amount we process will count towards your concessional contributions cap.

SECTION 5 ARE YOU CHANGING A PREVIOUS NOTICE?

No. Yes. I previously lodged a *Notice of intent* with UniSuper and now want to change the amount.

Previously-claimed amount

\$

SECTION 6 DECLARATION AND SIGNATURE

➤ Read this declaration before you sign and date your form, and note that providing false or misleading information—or failing to take reasonable care—can result in you being liable for administrative penalties imposed by tax law.

I declare at the time of lodging this notice:

- I intend to claim the after-tax contributions stated in SECTION 4 as a tax deduction. I understand if the amount stated in SECTION 4 is not available (for example, due to a payment or rollover), UniSuper will process the maximum amount available
- I'm a member of UniSuper
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy
- UniSuper currently holds these contributions and hasn't begun paying me a superannuation income stream based on all or part of these contributions
- I haven't included any of the contributions in an earlier valid notice.

If, in this notice, I'm **not** varying an amount claimed in a previous notice, I declare that I'm lodging this notice at the earlier of either:

- before the end of the day that I lodged my income tax return for the financial year in which the contributions covered by this notice were made, as stated in SECTION 4, or
- before the end of the financial year following the year in which the contributions covered by this notice were made, as stated in SECTION 4.

If, in this notice, I **am** varying an amount claimed in a previous notice, I confirm that either:

- I've lodged my tax return for the financial year the contributions were made in, before the end of the following financial year, and this variation notice is being lodged before the end of the day on which the return was lodged, or
- I'm yet to lodge my tax return for the relevant financial year and this variation notice is being lodged on or before 30 June in the financial year following the one I made the contributions in (whichever is earlier), or
- The ATO has disallowed my claim for a deduction for the relevant financial year and this notice reduces the amount stated in my previous valid notice by the amount that's been disallowed.

I declare that the information given on this notice is correct and complete.

Name

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>DD</small>	<small>MM</small>	<small>YYYY</small>

Returning your form

Mail to:
UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000

or email enquiry@unisuper.com.au

Need help?

- Email enquiry@unisuper.com.au
- Call **1800 331 685**