

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



AVOID PROCESSING DELAYS

We make important changes to our forms at times. Check you're using the latest version by comparing the issue date at the bottom of this page with the version at unisuper.com.au/forms.

Alternatively, 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 personal super contributions.



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.


Instructions

Complete 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.

Privacy information

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations. For more information on how we collect and manage your information refer to the *Privacy statement* at the end of this form.

SECTION 1 — Member details

 Use **BLACK** or **BLUE BALL POINT PEN** and print in **CAPITAL LETTERS**. Cross where required **X**. 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 (DDMMYYYY)

What phone number can we call you on if we have a question about this form?

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. 2018-19)?

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 into your account at [unisuper.com.au/login](https://www.unisuper.com.au/login).

- For contributions made in the **current** financial year, go to: 'Overview' > 'How your contributions are tracking' > '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 extra 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

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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

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Remember—this amount will count towards your concessional contributions cap. See the attached fact sheet for more information.

SECTION 5 — Are you changing a previous notice?

- > **No.** Go to SECTION 6.
- > **Yes.** I previously lodged a *Notice of intent* with UniSuper and now want to change the amount.

Previously-claimed amount

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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'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

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Date (DDMMYYYY)

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Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at [unisuper.com.au](https://www.unisuper.com.au) or by calling us on **1800 331 685**.



SEND YOUR FORM TO:

UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000
or email enquiry@unisuper.com.au



NEED HELP?

For more information:

- email enquiry@unisuper.com.au, or
- call **1800 331 685**.

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