

# Notice of intent to claim or vary a deduction for personal super contributions

The instructions within this form contain important information about completing this notice.

Please refer to them for more information on how to complete and lodge this notice.

This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box.

## Section A: Your details

### 1. Tax file number (TFN)









The ATO does not collect this information provided on this form. This form is to assist you in providing details to your super fund. Your super fund is authorised to request your personal details, including your TFN, under the Superannuation Industry (Supervision) Act 1993, the *Income Tax Assessment Act 1997* and the *Taxation Administration Act 1953*. It is not an offence not to provide your TFN. However, if you do not provide your TFN, and your super fund doesn't already hold your TFN, they will not be permitted to accept the contribution(s) covered by this notice. For more information about your privacy please contact the entity you are providing this form to.

### 2. Name

Title: Mr  Mrs  Miss  Ms  Other

Family name























First given name














Other given names











### 3. Date of birth (DD/MM/YYYY)











### 4. Current postal address






















Suburb/town/locality






















State/territory (Australia only)




Postcode (Australia only)






Country if outside of Australia





















### 5. Daytime phone number (include area code)











## Section B: Super fund's details

### 6. Fund name






















### 7. Fund Australian business number (ABN)












### 8. Member account number









### 9. Plan/Product name















### 10. Unique Superannuation Identifier (USI) (if known)

## Section C: Contribution details

### 11. Personal contribution details

Is this notice varying an earlier notice? No  Yes

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.

If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

### Original notice to claim a tax deduction

12. Financial year ended 30 June 20

13. My personal contributions to this fund in the above financial year \$    ,    .

14. The amount of these personal contributions I will be claiming as a tax deduction \$    ,    .

## Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

### Intention to claim a tax deduction

**Complete this declaration if you have not previously lodged a valid notice with your super fund for these contributions.**

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice at the earlier of **either**:

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
- before the end of the income year following the year in which the contribution was made.

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

Name (Print in BLOCK LETTERS)

Signature

Date

/   /

**Do not send this form to the Australian Taxation Office.**

### Variation of previous valid notice of intent

15. Financial year ended 30 June 20

16. My personal contributions to this fund in the above financial year \$    ,    .

17. The amount of these personal contributions claimed in my original notice of intent \$    ,    .

18. The amount of these personal contributions I will now be claiming as a tax deduction \$    ,    .

## Section D: Declaration (continued)

Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to reduce the amount stated in that notice.

### Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.

I declare that I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice and I confirm that either:

- I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or
- I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, or
- the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

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

Name (Print in BLOCK LETTERS)

Signature

Date

Do not send this form to the Australian Taxation Office.

## 3 easy ways to return your form

To make submitting your completed form as simple as possible, we've provided three easy options for you to choose from. Please read through the choices below and select the one that's most convenient for you.



### Use Member Online

The fastest and more secure way to send back your forms is through the contact us page within Member Online. Simply save and attach the PDF of your completed form and you're done.

[www.mercersuper.com.au](http://www.mercersuper.com.au)



### Email Us\*

Another way to send back your form is via email. It's quicker if you use your email address you use to log in and send to

[MST@Mercer.com](mailto:MST@Mercer.com)



### Post it back

Otherwise, you can always send it back to us using the below postal address

**Mercer Super Trust,  
GPO Box 4303,  
Melbourne, VIC 3001**

#### \*Please note:

This is a 'no-reply' mailbox and should only be used to submit a form. If you have an inquiry, please submit this via the contact us page or call the helpline on **1800 682 525**. The file formats accepted for form submissions are PDF, JPEG, PNG, and JPG.

Only one form per email avoids confusion and ensures each form and its supporting documentation is processed correctly.