

Providing your tax file number to the Mercer Super Trust

Don't pay more tax than you have to

In line with the Superannuation Industry (Supervision) Act 1993, the trustee of the Mercer Super Trust is authorised to ask for your tax file number. The trustee will only use your tax file number for lawful purposes. These purposes may change in the future if there are changes to legislation.

The trustee may pass your tax file number to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your tax file number:

- the trustee will be able to accept all types of contributions made by or for you (some limits may apply)
- you can avoid paying tax at a higher rate than would otherwise apply on your contributions
- you can avoid paying tax at a higher rate than would otherwise apply on your super benefit, and
- it will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

- Choosing not to provide your tax file number is not an offence. However, if you don't provide your tax file number now or in the future:
- the trustee will only be able to accept contributions made for you by your employer. No other contributions, for example, after-tax contributions can be accepted
- you may pay more tax on contributions made for you by your employer. In some circumstances you may be able to claim back this additional tax, however time limits, fees and other rules may apply
- you may pay more tax on your super benefit than you would otherwise (although you can claim this back when you lodge your tax return).

If you need help

For assistance or to access the Privacy Policy and your personal information call the Helpline on **1800 682 525**.

Step 1: Complete your personal details

Title: Mr Mrs Ms Miss Other Date of birth: / /

Given names

Surname

Account/Membership number



Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your superannuation. You can read our Privacy Policy online at mercer.com.au/privacy or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 2: Provide your tax file number & sign the form

Tax file number: - -

By signing this form I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature Date / /

Please return your completed form to Mercer Super Trust, GPO Box 4303, Melbourne, VIC 3001.

