

## Tax File Number Declaration

### Purpose of this form

Please complete this form if you are under 60 and wish to re-lodge your taxation options to the Australian Taxation Office.

### A. Taxation options

#### Member details

1.

- Your Tax File Number (TFN):  -  -  **OR**
- You have an individually issued Exemption Code:  -  -  **OR**
- You have made a separate application/enquiry to the ATO for a new or existing TFN, **OR**
- You are claiming an exemption because you are under 18 years of age and do not earn enough to pay tax, **OR**
- You are claiming an exemption because you are in receipt of a pension, benefit or allowance.

2. Your name

Title

Mr  Mrs  Ms  Miss  Dr  Other

Given name(s)

Surname

3. If you have changed your name since you last dealt with the ATO, show your previous family name

4. Your date of birth

5. Your home address in Australia

Street number and name

Suburb

State

Postcode

Country (if other than Australia)

6. Basis of payment

- Full-time employment  Part-time employment  Casual employment  
 Labour hire  Superannuation Pension OR Annuity

7. Are you an Australian resident for taxation purposes?

- Yes  No If 'No', you must answer 'No' at Question 8

8. Do you wish to claim the tax-free threshold from this payer?

- Yes  No

**Note:** Only claim the tax-free threshold from one payer at a time unless your total income from all sources for the financial year will be less than the tax-free threshold.

**B. Declaration**

I declare that the information I have given on this form is true and correct.

Before providing your TFN to the Trustee, the Trustee is required to tell you the following:

- The Trustee is authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993. This legislation also requires your employer to pass your TFN to Clearview if you have given it to them for superannuation purposes.
- Your TFN will be used for legal purposes only. This includes finding or identifying your superannuation benefits, calculating tax on superannuation payments and providing information to the ATO to enable it, amongst other things, to calculate the surcharge payable, if any. These purposes may change in the future. Your TFN may be provided to another superannuation plan or retirement savings account provider that receives any transferred benefits in the future, unless you notify the Trustee in writing not to forward the TFN. Apart from these uses, your TFN will be kept confidential.
- It is not an offence to not supply your TFN.
- If you choose not to supply your TFN:
  - You may be subject to more tax than you would otherwise pay on your contributions and the payments you receive from ClearView.
  - It may be more difficult to locate your superannuation benefits.

Signature of applicant

X

Date signed

D D M M Y Y Y Y

**Note:** There are penalties for deliberately making a false or misleading statement.

**To be completed by payer**

1. ABN

45 828 721 007

2. Not applicable

3. Payer's registered business name

CLEARVIEW RETIREMENT PLAN

4. Contact person

Lauren Beattie

Daytime telephone

132 977

Signature of payer

Lauren Beattie

Date signed

D D M M Y Y Y Y

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We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy refer to [clearview.com.au](https://clearview.com.au)

### Sending your Form

Please send the form to us via your email address on file or mail.

Mailing address:

**ClearView Wealth**

**Reply Paid 4232**

**Sydney NSW 2001**

Email address:

**client.wealth@clearview.com.au**

If you have any questions or need help please call our Service Centre on **132 977**.