



BT Lifetime Super — Employer Plan Downward Variation of a Previous Tax Deduction Notice – for contributions on or after 1 July 2007

BT Contact Centre © 132 135 (8am–6.30pm Mon-Fri, Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724
RSE L0001090 is the Trustee of BT Lifetime Super — Employer Plan
RSE R1001327 ABN 39 827 542 991

Use this form if you have already provided us with a Personal Tax Deduction Notice for your personal contributions and you wish to reduce the amount stated in that notice.

Complete this form using **black pen** — print in clear **CAPITAL LETTERS**

IMPORTANT INFORMATION ABOUT SUBMITTING A DOWNWARD VARIATION

You are only able to complete this form if you are reducing the amount of a previous Personal Tax Deduction Notice submitted for personal contributions made on or after 1 July 2007, and:

- you have not submitted your tax return in respect of the year in which the contribution was made; and
- the date on which you are making this variation is before 30 June in the financial year following the financial year in which the contributions were made.

These timing restrictions do not apply if you are seeking to vary a previous notice as a result of a deduction not being allowed, and you are reducing the amount of the previous notice by the amount that is not allowed.

In addition, please be aware that you can not make a variation to a Personal Tax Deduction Notice where:

- you are no longer a member of the fund
- the trustee no longer holds the contributions
- the trustee has begun to pay a pension based in whole or part on the contributions
- the trustee has accepted a contribution-splitting application in relation to the contributions.

If you wish to make a variation to a previous notice you must provide this to the Trustee prior to any of the above events.

If you withdraw part of your superannuation benefit (as a rollover or cash lump sum), the Trustee will no longer hold all of your personal contributions. Therefore following a partial withdrawal, the amount by which you can reduce a previous Personal Tax Deduction Notice will be limited to the proportion of your personal contributions that remain in the fund.

After receiving your Personal Tax Deduction Notice we will send you a letter, within 30 days, acknowledging the amount you will be claiming. You must receive this acknowledgment letter before you lodge your income tax return and should retain it with your tax records. Once you have received this acknowledgement, you cannot withdraw or revoke the notice, but you can apply to **reduce** it.

We recommend that you talk to your adviser regarding your eligibility and the amount you wish to claim as a tax deduction.

1. MEMBER DETAILS

BT Employer number (7–8 numbers)

Employer name

BT Member number (12–13 numbers)

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

Address

Postcode

Email address*

* In the future, BT may elect to email correspondence to you

2. PERSONAL TAX DEDUCTION NOTICE – VARIATION

I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice.

\$ has been advised in a previous notice.

I advise that at the time of completing this Personal Tax Deduction Notice, I now intend to claim the personal contributions stated below as a tax deduction in my income tax return for the financial year stated below. I acknowledge personal contributions made to BT Lifetime Super — Employer Plan during the financial year stated below, of which:

\$

+

\$

will be claimed as a tax deduction under Subdivision 290-C of the Income Tax Assessment Act 1997 and therefore subject to the 15% Contributions Tax, and

will not be claimed as a tax deduction.

is the amount of my personal contributions covered by this notice

for the financial year ending 30 June



03-17-027-01

3. DECLARATION AND SIGNATURE

At the time of completing this notice, I confirm that:

- Either:
 1. I have not lodged my income tax return for the year I am claiming this deduction and this notice is being lodged on or before 30 June in the financial year following the year the contribution was made; or
 2. the ATO has disallowed my claim for a tax deduction for the financial year stated above and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.
- I intend to claim the personal contributions identified above as a tax deduction
- I wish to vary my previous notice for these contributions by **reducing** the amount I advised in my previous notice
- I am a member of BT Lifetime Super — Employer Plan
- BT Lifetime Super — Employer Plan still holds the contributions I intend to claim as a tax deduction
- BT Lifetime Super — Employer Plan has not commenced to pay an income stream based in whole or part on the contributions I intend to claim as a tax deduction
- The information given on this notice is correct and complete

MEMBER MUST SIGN AND DATE THIS FORM ON THE NEXT PAGE

Signature of **Member**

Date (dd/mm/yy)

You can submit this form by:

- ✉ mail BT Lifetime Super — Employer Plan
GPO Box 2919
Adelaide SA 5001
- ☎ fax (02) 9274 5402