BT Financial Group

BT Business Super – Tax File Number

Form issued 1 July 2007

BT Customer Relations ✆ 132 135 (8.00am – 6.30pm Mon-Fri Sydney Time)

Westpac Securities Administration Limited ABN 77 000 049 472 AFSL No. 233731 RSE L0001083 is the Trustee of BT Business Super RSE R1003970.

- The Superannuation Industry (Supervision) Act 1993 authorises the Trustee to request Tax File Numbers (TFNs) from members in the plan.
- Legislation also requires your employer to pass your TFN to the Trustee in certain circumstances

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

BT Member number *(if known)*

BT Employer number *(if known)*

Employer name

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Surname

Date of birth

D D / M M / Y Y Y Y

Tax file number

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993 (SIS).

It is not an offence if you do not quote your TFN, however, if you do not tell your employer or the Trustee, either now or later, you may pay more tax on your benefits and surcharge on contributions than you have to.

You may be able to collect this back from the Australian Tax Office (ATO) through the income tax assessment process. It may also be more difficult for you to locate your benefit in the future. These consequences may change in the future.

If provided, your TFN will be used for legal purposes only, including: sending it to the trustee of your superannuation plan who may use it to find or identify your superannuation benefit; for calculating tax on any superannuation benefit and passing it onto the Commissioner of Taxation to, amongst other things, allow the Commissioner to assess the surcharge payable on contributions. These purposes may change in the future.

The Trustee may pass your TFN onto another super institution or to a Retirement Savings Account (RSA) provider, to which benefits are transferred unless you notify us otherwise in writing, in which case it will be kept confidential.

Signature of **Member**

Date

/ /

Please return form to:

BT Business Super
GPO Box 2362
Adelaide SA 5001
or
Fax to 02 9274 5402

03-03-108-01