



BT Lifetime Super – Employer Plan Personal 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 to advise whether a tax deduction will be claimed on personal contributions received in BT Lifetime Super – Employer Plan on or after 1 July 2007.

IMPORTANT INFORMATION ABOUT CLAIMING A TAX DEDUCTION

You may be eligible to claim a tax deduction for personal superannuation contributions you have made. Generally, eligible persons include self-employed persons, substantially self-employed persons and non-employed persons.

Personal contributions you claim a deduction for will be treated as concessional contributions. Your total concessional contributions made to superannuation for the financial year will be concessionally taxed up to your concessional contributions cap. If your total concessional contributions exceed your concessional contributions cap in a financial year, you may be liable to pay excess concessional contributions tax to the ATO. You should also consider the effect of claiming a deduction on your super co-contribution eligibility.

HOW TO CLAIM YOUR TAX DEDUCTION

If you wish to claim a tax deduction for personal contributions you made during the 2011/12 financial year, you must complete and return your Personal Tax Deduction Notice before whichever of the following occurs first:

- the day you lodge your income tax return for the 2011/12 financial year, or
- 30 June 2013.

If you wish to claim a tax deduction for personal contributions you made during the 2010/11 financial year, you must complete and return your Personal Tax Deduction Notice before whichever of the following occurs first:

- the day you lodge your income tax return for the 2010/11 financial year, or
- 30 June 2012.

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.

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

Please be aware that you cannot provide or make a variation to, a Personal Tax Deduction Notice if:

- you are no longer a member of the fund;
- the trustee no longer holds the contribution (this may occur if you make a partial withdrawal);
- the trustee has begun to pay an income stream based in whole or part on the contribution; or
- the trustee has accepted a contributions-splitting application in relation to the contribution.

If you wish to provide a notice or make a variation 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, you can only provide a Personal Tax Deduction Notice for the proportion of your personal contributions that remain in the fund.

If you have made personal contributions prior to 1 July 2007 and have not yet, but wish to, claim a deduction, you will need to complete a Section 82AAT Notice. Please contact our BT Contact Centre Consultants on 132 135 for further information.

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

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

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

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2. PERSONAL TAX DEDUCTION NOTICE

Once a Personal Tax Deduction Notice has been submitted, it cannot be revoked or adjusted to claim a higher amount.

It is recommended that you talk to your adviser regarding the amount you can claim as a tax deduction.

I wish to advise that at the time of completing this Personal Tax Deduction Notice, I 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

I confirm that my Tax File Number is

3. DECLARATION AND SIGNATURE



- I have not lodged my income tax return for the financial year stated above.
- I am providing this notice before of the financial year stated above.
- I intend to claim the personal contributions identified above as a tax deduction.
- I am a member of BT Lifetime — Employer Super.
- The Fund still holds the contributions I intend to claim as a tax deduction.
- The Trustee has not commenced to pay an income stream based in whole or part on the contributions I intend to claim as a tax deduction.
- I have not included the contributions I intend to claim as a tax deduction in an earlier notice.
- This notice is not varying an earlier notice.
- The information given on this notice is correct and complete.

Signature of **Member**

Date (dd/mm/yy)

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You can submit this form by:

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