



BT Lifetime – Personal Super
 BT Retirement Selection – Personal Super
 BT Classic Lifetime – Personal Super
 BT Superannuation Investment Fund
 BT Superannuation Savings Fund

Personal Tax Deduction Notice – for contributions on or after 1 July 2010

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 – Personal Super ABN 83 953 436 008 RSE R1003864, BT Retirement Selection – Personal Super Plan and BT Superannuation Investment Fund ABN 39 827 542 991 RSE R1001327

BT Funds Management No.2 Limited ABN 22 000 727 659 AFSL 233720 RSE L0001076 is the Trustee of BT Classic Lifetime – Personal Super RSE ABN 68 324 870 141 R1003925

Westpac Securities Administration Limited ABN 77 000 049 472 AFSL 233731 RSE L0001083 is the Trustee of BT Superannuation Savings Fund ABN 83 835 373 437 RSE R1003963

- Use this form to advise whether a tax deduction will be claimed on personal contributions received in BT Personal Super on or after 1 July 2010.

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 concessional tax up to your concessional contributions cap (for 2010/11 and 2011/12 this is \$25,000 pa or \$50,000 pa if you are aged 50 or over). 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.

After receiving your Personal Tax Deduction Notice we will send you a letter 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.

Please be aware that you can not lodge, 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 or rollover);
- 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 on 132 135 for further information.

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

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

1. MEMBER DETAILS

Investor number

C

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

/ /

Daytime phone number

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Mobile phone number

Email address*

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



02-30-044-03

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 to BT Personal Super as follows (complete all fields below including the financial year):

\$

+

\$

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 ended 30 June 2011
- I am providing this notice before 30 June 2012
- I intend to claim the personal contributions identified above as a tax deduction
- I am a member of BT Personal 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)

You can submit this form by:

- ✉ mail BT
GPO Box 2675
Sydney NSW 2001
- ☎ fax (02) 9274 5780