

Application for reclassification of contribution(s)

i Use this form to:

Request reclassification of part or all of your super contribution(s). Only use this form if you are the person who made the error when making the contribution. This includes if you are the employer or adviser for the client on our records.

Do not use this form if your request relates to:

- The return of super contribution(s) - complete the 'Application for return of contributions' form.
- The reclassification of a downsizer contribution, personal injury contribution or a CGT exempt contribution – in these cases please call us on 1300 881 716.

You can type directly into the form and print before signing, or print then complete in block letters. Each section of the form must be completed for this request to be processed.

Important information

We can only reclassify super contribution(s) when the original details provided for the super contribution(s) were incorrect at the time the super contribution(s) were paid or in certain circumstances, where the contribution(s) was a result of genuine error.

In some cases, it may not be possible to reclassify the super contribution(s). If this is the case, we will contact you and let you know.

Circumstances that will be considered

The Trustee can only consider the following applications for reclassification of super contribution(s):

- this form has been provided with all sections completed and signed, providing sufficient details, supporting documents, including the statutory declaration in section 5 explaining the error; and
- the contribution was made in the current or last financial year (unless exceptional circumstances exist);
- the member has provided an incorrect reference (e.g., incorrect BPAY code) when the contribution was made; or
- the employer has made an administrative error (e.g., incorrect contribution reference) when the contribution was made; or
- an adviser error has occurred, and the contribution was not processed in accordance with the member's original instructions at the time the contribution was made.

Supporting evidence

Evidence must be provided to support that a genuine error has occurred along with completing the **Statutory Declaration in section 5**. The following table shows types of evidence we can accept.

To reclassify your contribution to the following...	Please provide:
Personal Contribution	<ul style="list-style-type: none"> • A copy of a bank statement showing that the contribution came from a personal bank account, and • Payslip showing it was an after tax contribution, or • If applicable, a copy of a Statement of Advice (must be signed and dated) or Record of advice which shows that the amount paid was intended to be a personal contribution.
Super Guarantee or Salary Sacrifice	<ul style="list-style-type: none"> • Copy of employer records to show that this was recorded as a Super Guarantee / Salary Sacrifice contribution, or • A payslip to show that this amount was intended to be a Super Guarantee or Salary Sacrifice contribution.
Spouse Contribution	<ul style="list-style-type: none"> • A copy of a bank statement, confirming the funds originated from the contributing spouse's personal funds, and • A letter from the member's accountant confirming how the contribution was treated in the receiving spouse's tax return, or • A copy of a Statement of Advice (must be signed and dated) or Record of advice which shows that the amount paid was intended to be a spouse contribution.

Note:

- If you are self-employed, or if the super contribution was sourced from a family trust, you must provide a letter from your accountant confirming the treatment of the super contribution in the business/company records or family trust tax return.
- A payslip should only be provided if the contribution that is being reclassified was received from an employer.
- We may contact you to request additional information to support that a genuine error has occurred.



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INFORMATION ON TAX DEDUCTIONS

If you have made a personal contribution and claimed a tax deduction however the ATO has disallowed the deduction, simply provide us with a copy of the ATO determination to amend our records.

If you are varying the amount you have claimed as a tax deduction, you can provide a new Personal Tax Deduction Form within the legislated period. A deduction notice can be completed or varied online at panorama.com.au on the Contributions page.

Note: If you are re-classifying your personal contribution on which you have previously claimed a tax deduction to another contribution type, we may contact you to request further information.

Privacy statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at www.bt.com.au/privacy/privacy-statement or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application.

1 Adviser Details (if applicable)

Adviser number

Adviser full name

2 Member Details

Account name

Account number

3 Contribution Details

Original details

If the number of contributions which you are requesting to be reclassified exceeds the number of options provided below, you can provide us with documentary information such as a cover letter or a spreadsheet including the information outlined below.

Date contribution paid	Contribution amount	What is the transaction currently recorded as?	What should the classification have been if classified correctly at the time?	Amount to be reclassified (if different to contribution amount)
Eg. 7/2/2024	\$200	Personal Contribution	Personal Contribution	\$100
		Super Guarantee	Super Guarantee	
		Salary Sacrifice	Salary Sacrifice	
		Spouse Contribution	Spouse Contribution	
		Personal Contribution	Personal Contribution	
		Super Guarantee	Super Guarantee	
		Salary Sacrifice	Salary Sacrifice	
		Spouse Contribution	Spouse Contribution	



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Personal Contribution	Personal Contribution
Super Guarantee	Super Guarantee
Salary Sacrifice	Salary Sacrifice
Spouse Contribution	Spouse Contribution
Personal Contribution	Personal Contribution
Super Guarantee	Super Guarantee
Salary Sacrifice	Salary Sacrifice
Spouse Contribution	Spouse Contribution

Note: If you are intending to reclassify your contribution to a personal contribution and intending to claim a tax deduction, you will need to ensure a completed 'Personal tax deduction notice' is received by the fund by the due date'.

4 Declaration and Acknowledgements

I declare that all details given on this form are true and correct. In addition, I declare & I acknowledge that:

- I have the authority to request a reclassification of the contribution(s) set out in section 3 (applicable to employers and advisers only)
- I have notified the member who holds the BT account of the request to have the contributions reclassified and I accept that BT will direct the member to contact me if they have any questions or concerns (applicable to employers and advisers only).
- An administrative error occurred when the contribution was made, resulting in it being classified differently to what was originally intended.
- I have provided documentary evidence in support of the request including the completion of the Statutory declaration, to reclassify the contribution(s).
- I have read and understood BT's privacy statement.

Signatures

This form is to be signed by either the member, employer or adviser.

Full Name

Employer Name (if applicable)

Signature ([Wet \(pen\) signature](#) required)

Date (dd/mm/yyyy)

Member Employer Adviser



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5 Statutory declaration

This statutory declaration must be completed by the person who completed the Application for reclassification or return of contributions form. Which must include:

- What the error was
- How the error was made
- Which contributions were incorrect and
- State the amended instructions.

Please ensure that the statutory declaration is signed in the presence of a person authorised to witness statutory declarations. Refer to the List of authorised persons authorised to sign statutory declarations on the next page.

Alternatively, you can create a digital Commonwealth statutory declaration in myGov using your Digital Identity then print and attach the digital Commonwealth statutory declaration to the form.

Commonwealth of Australia
STATUTORY DECLARATION
Statutory Declarations Act 1959

1 *Insert the name, address and occupation of person making the declaration* 1, .

make the following declaration under section 9 of the *Statutory Declarations Act 1959*:

2 *Set out matter declared to in numbered paragraphs* 2



