Suncorp Everyday Super™

Tax File Number declaration form

SUNCORP

Suncorp Everyday Super account number

Please complete this form in a blue or black pen, using BLOCK letters and cross (✗) to mark answer boxes. If you have reached age 60, you are not required to complete this form.

1 Your Tax File Number (TFN)

OR application made to the ATO for a new or existing TFN ☐ OR exemption claimed - under 18 years of age and do not earn enough to pay tax ☐ OR exemption claimed as a pensioner, benefit or allowance ☐

2 Your name Mr ☐ Mrs ☐ Miss ☐ Ms ☐

Surname or family name

First given name

Other given names

3 If you have changed your name since you last dealt with the ATO, show your previous family name

4 Your date of birth Day / Month / Year

5 Your home address in Australia

Suburb or town

State Postcode

6 On what basis are you paid? (Select only one)

Full-time employment ☐ Part-time employment ☐ Labour hire ☐ Superannuation income stream ☐ Casual employment ☐

7 Are you an Australian resident for taxation purposes?

Yes ☐ No ☐ If 'No', you must answer 'No' at question 8.

8 Do you wish to claim the tax-free threshold from this payer?

Only claim the tax-free threshold from one payer

If you have more than one source of income and currently claim the tax-free threshold from another payer, DO NOT claim now.

Yes ☐ No ☐ Answer **NO** at questions 9 and 10 unless you are a non-resident claiming a Senior Australians zone or overseas forces tax offset.

9 Do you want to claim the senior Australians tax offset by reducing the amount withheld from payments made to you?

Yes ☐ Complete a Withholding declaration (NAT 3093), but only if you are claiming the tax-free threshold from this payer, No ☐

10 Do you want to claim a zone, overseas forces, dependent spouse or special tax offset by reducing the amount withheld from payments made to you?

Yes ☐ Complete a Withholding declaration (NAT 3093), No ☐

11 a) Do you have an accumulated Higher Education Loan Programme (HELP) debt?

Yes ☐ Your payer will withhold additional amounts to cover any compulsory repayments. No ☐

b) Do you have an accumulated Financial Supplement debt?

Yes ☐ Your payer will withhold additional amounts to cover any compulsory repayments. No ☐

Declaration:

DECLARATION by payee: I declare that the information I have given is true and correct.

✗ You must sign here

Date Day / Month / Year

Please note There are penalties for deliberately making a false or misleading statement.

Section B – to be completed by PAYER

1 ABN 61 063 427 958

2 Registered business name or trading name (or individual name if not in business)

SUNCORP PORTFOLIO SERVICES LIMITED

3 Trading name - if applicable

4 Business Address

GPO BOX 2585
BRISBANE
QLD Postcode 4001

5 Contact person CUSTOMER SER-VICE CENTRE

Business phone number STD 18 00191517

Declaration by payer: I declare that the information I have given is true and correct.

Signature of payer

✗

Date Day / Month / Year

Please note There are penalties for deliberately making a false or misleading statement.

Please provide an estimate of the time taken to complete Section B. mins

Tax file number declaration

The information you provide in this declaration will enable your payer to work out how much tax to withhold from payments made to you.

Terms we use

- **payer** – we are referring to the business or individual making payments under the pay as you go (PAYG) withholding system.
- **payee** – we are referring to the individual being paid.

When should you use this form?

You should complete this form before you start to receive payments from a new payer, or your circumstances change. For example, when you receive:

- payments for work and services as an employee, company director or office holder
- payments under return-to-work schemes
- payments under labour hire arrangements or other specified payments
- benefit and compensation payments
- superannuation benefits.

The information you provide on this form is used to determine the amount of tax to be withheld from payments made to you. For example, whether you:

- claim the tax free threshold
- are an Australian resident for tax purposes
- have a Higher Education Loan Program (HELP) debt
- have a Financial Supplement debt.

Individuals who reach age 60 and commence a superannuation benefit that does not include an untaxed element, do not need to complete this form for that superannuation benefit.

Question 1
What is your tax file number (TFN)?
This question asks you to supply your TFN.

Your payer and the Tax Office are authorised by the *Taxation Administration Act 1953* to collect your TFN on this form. It is not an offence not to quote your TFN. However, your payer is required to withhold 46.5% from all payments made to you if you do not:

- provide a *Tax file number declaration* (NAT 3092) to your payer
- quote your TFN, or
- claim an exemption from quoting your TFN.

You may claim an exemption from supplying your TFN.

Print ☒ in the appropriate box if you:

- have lodged a TFN application or enquiry form for individuals or made a phone or shop front enquiry to obtain your TFN.

  You now have 28 days to provide your TFN to your payer who must withhold at the standard rate during this time. After 28 days if you haven't given your TFN to your payer they will withhold the top rate of tax plus the Medicare levy from future payments.
- are claiming an exemption from quoting a TFN. You are exempt from quoting your TFN if you are:
  - under 18 years of age and do not earn enough to pay tax, or
  - an applicant or recipient of certain pensions, benefits or allowances from:
    - Centrelink – however you will need to quote your TFN if you receive Austudy, Newstart, sickness or parenting allowance
    - Department of Veterans' Affairs – a service pension under the *Veterans' Entitlement Act 1986*, or
    - the Military Rehabilitation and Compensation Commission.

For more information about privacy, see 'Privacy of information' on page 14.

Provision of your TFN to your superannuation fund
Your payer must pass your TFN to the superannuation fund to which contributions are being made on your behalf. If your superannuation fund does not have your TFN, we can provide it to them. This enables:

- your superannuation fund to accept all types of contributions to your account(s)
- no increase to the tax on contributions to your superannuation account(s)
- no additional tax to be deducted when you start drawing down your superannuation benefits, other than the tax that may ordinarily apply
- ease in tracing different superannuation accounts in your name so that you receive all your superannuation when you retire.

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred. You may request to the trustee of your superannuation fund, in writing, not to disclose your TFN to any other trustee.

Questions 2, 3, 4 and 5
Fill in your personal information.

Question 6
On what basis are you paid?
Check with your payer if you are not sure.

Question 7
Are you an Australian resident for tax purposes?

Generally, we consider you to be an Australian resident for tax purposes if you:

- have always lived in Australia or you have come to Australia and now live here permanently
- are an overseas student doing a course that takes more than six months to complete
- have been in Australia continuously for six months or more and for most of that time you worked in the one job and lived in the same place
- will be or have been in Australia for more than half of the financial year (unless your usual home is overseas and you do not intend to live in Australia).

If you go overseas temporarily and do not set up a permanent home in another country, you may continue to be treated as an Australian resident for tax purposes.

Answer 'NO' to this question if you are not an Australian resident for tax purposes. You must also answer 'NO' at questions 8, 9 and 10 (unless you are a non-resident claiming a senior Australians, zone or overseas forces tax offset).

Question 8
Do you want to claim the tax-free threshold from this payer?

The tax-free threshold is the amount of income you can earn each year that is not taxed. It is available only to people who are Australian residents for tax purposes (that is, people who answered 'YES' at question 7).

Answer 'YES' if you:

- are an Australian resident for tax purposes
- are not currently claiming the tax-free threshold from another payer
- want to claim the tax-free threshold.

Answer 'NO' if you either:

- answered 'NO' to question 7
- have claimed the tax-free threshold from another payer
- do not wish to claim the tax-free threshold.

Question 9
Do you want to claim the senior Australians tax offset by reducing the amount withheld from payments made to you?

You are not entitled to reduce your withholding amounts, or claim the senior Australians tax offset with more than one payer at the same time.

If you receive income from more than one source, contact us on **1300 360 221** between 8.00am and 6.00pm, Monday to Friday.

Answer 'YES' if you are eligible and choose to receive the senior Australians tax offset. You can reduce the amount withheld from payments made to you during the year by completing a *withholding declaration* (NAT 3093).

Question 10

Do you want to claim a zone, overseas forces, dependent spouse or special tax offset by reducing the amount withheld from payments made to you?

You are not entitled to claim tax offsets from more than one payer at the same time.

You may be eligible for:

- a zone tax offset if you live or work in certain remote or isolated areas of Australia
- an overseas forces tax offset if you serve overseas as a member of Australia's Defence Force or a United Nations armed force
- special tax offset for a dependent invalid relative, dependent parent, housekeeper caring for an invalid spouse or a dependent child-housekeeper.

Answer 'YES' to this question if you are eligible and choose to receive tax offsets by reducing the amount withheld from payments made to you. You also need to complete a *Withholding declaration* (NAT 3093).

Answer 'NO' to this question if you are not eligible or choose to receive any of these tax offsets as an end-of-year lump sum through the tax system.

Non-resident

If you are not a resident of Australia for tax purposes, you are not entitled to claim a dependent spouse tax offset or a special tax offset. You may be entitled to claim the zone or overseas forces tax offset.

Question 11

(a) Do you have an accumulated Higher Education Loan Program (HELP) debt?

Answer 'YES' if you have an accumulated HELP debt.

Answer 'NO' if you do not have an accumulated HELP debt, or you have repaid all your HELP debt.

You have a HELP debt if either:

- the Australian Government lends you money under HECS-HELP, FEE-HELP, OS-HELP, VET FEE-HELP
- you have a debt from the previous Higher Education Contribution Scheme (HECS).

(b) Do you have an accumulated Financial Supplement debt?

Answer 'YES' if you have an accumulated Financial Supplement debt.

Answer 'NO' if you do not have an accumulated Financial Supplement debt, or you have repaid all your Financial Supplement debt.

Have you repaid this debt?

When you have repaid your accumulated HELP or Financial Supplement debt, you must complete a new *Withholding declaration* (NAT 3093).

Sign and date the declaration

Make sure you have answered all the questions in Section A and have signed and dated the declaration. Give your completed declaration to your payer.

Privacy of information

We are authorised by tax laws, including the *Income Tax Assessment Act 1936*, to ask for information on this declaration. We need this information to help us administer those laws.

Where we are authorised by law to do so, we may give this information to other government agencies. These agencies could include Centrelink, Australian Federal Police, Child Support Agency, Departments of Families, Housing, Community Services and Indigenous Affairs, Veterans' Affairs, and Education, Employment and Workplace Relations.

Only certain people and organisations can ask for your TFN. These include employers, some Australian Government agencies, including Child Support Agency, trustees for superannuation funds, payers under the PAYG system, higher education providers and investment bodies such as banks. We are authorised by the *Taxation Administration Act 1953* to collect your TFN. You are not required by law to provide your TFN. However, quoting your TFN reduces the risk of administrative errors and having extra tax withheld.