Suncorp Everyday Super™

s290-170 Notice of intention to claim tax deduction

SUNCORP Superannuation

Issued 1 January 2014

Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958, AFSL 237905, RSE L0002059
Suncorp Everyday Super is part of the Suncorp Master Trust, ABN 98 350 952 022, RSE R1056655

Please use this form if you wish to claim a tax deduction for your personal contributions made to your Suncorp Everyday Super account. We recommend you seek advice from a tax professional before completing this form.

Tips to help you complete this form

- Use a blue or black pen and write in CAPITAL letters
- Use an '✕' to mark answer boxes
- Complete all sections of the form and sign and date on the last page

Have any questions?

If you'd like help completing this form, or if you have any questions, just call us on 1800 191 517.
We'll be happy to help.

Important information

We cannot accept a notice of intention to claim a tax deduction on any part or full amount of a personal contribution that you've used to start a pension. Where you've partially or wholly rolled over or withdrawn the contributions made to your Suncorp Everyday Super account, the maximum tax deduction that can be claimed may decrease.

A tax deduction can only be claimed if:

- You are self-employed, substantially self-employed (see definition below), retired or unemployed; where contributions have not been rolled, withdrawn or used to start a pension before receipt of any s290-170 notice
- You advise the Trustee of the amount you want to claim as a tax deduction
- The Trustee acknowledges your advice (an acknowledgement will be issued promptly after receipt of this form from you)

Please refer to the Australian Tax Office (ATO) or your accountant for further information.

Substantially self-employed

You are substantially self-employed if less than 10% of your assessable income plus reportable employer super contributions and reportable fringe benefits is from employment as an employee for that financial year.

Eligible employment

'Eligible employment' means an occupation where your employer would normally be obliged to make Award or Super Guarantee contributions to a super fund for your benefit.

Contributions tax

Contributions tax at the rate of 15%[†] will be deducted from the amount of contributions that you claim, less any applicable insurance premiums paid in the relevant financial year. Additional tax may apply in relation to amounts exceeding the concessional contributions cap.

Personal contributions that are claimed as a tax deduction for a particular financial year are subject to the concessional cap for that year. In addition, any excess concessional contributions will count towards the non-concessional cap. To find out what the current cap levels are, go to ato.gov.au/super.

[†] The Government has announced that 30% contributions tax will apply for people earning over $300,000.

Personal details

Suncorp Everyday Super account number (if known)

Title

Last name

Given name(s)

Date of birth d d / m m / y y y y

Street name and number

Suburb/Town

State

Postcode

Daytime phone number

Alternative phone number

Email address

Notice of intention to claim a tax deduction

Please select from one of the following options and answer **all** questions below – your declaration will be invalid if you do not specify the relevant amounts in each section.

☐ I am lodging a deduction notice for these super contributions for the first time

☐ I am varying a previous deduction notice

Financial year for which you are claiming a tax deduction — Financial year ending 30 June 20

Contributions already claimed as a tax deduction for this financial year — $, , .

Additional contributions being claimed within this notice as a tax deduction — $, , .

Contributions not being claimed as a tax deduction — $, , .

Total contributions for the year — $, , .

Tax File Number (TFN) notification

It's important we have your TFN. While providing your TFN is voluntary, you should know that if you don't provide us your TFN, then:

- We can't accept any after-tax (non-concessional) contributions
- It may be difficult to find and rollover (combine) your super in the future and
- You may pay more tax on pre-tax (concessional) contributions than would otherwise be payable

For more information, please refer to the current Suncorp Everyday Super PDS.

TFN

Declaration and signature

If you are lodging a notice for these super contributions for the first time, please sign the declaration below

I confirm:

- The information given on this notice is correct and complete
- I have a Suncorp Everyday Super account and intend to claim the amount provided above as a tax deduction for the financial year provided above
- The amount covered by this notice hasn't been included in an earlier s290-170 notice of intention to claim a tax deduction
- I'm lodging this notice before both of the following dates
  - The day that I lodge my income tax return for the financial year the contributions were made
  - The end of the financial year after the financial year in which I made the contributions
- Suncorp Everyday Super has not begun to pay a pension in whole or part in respect of these contributions
- I haven't rolled over or withdrawn the contributions from my Suncorp Everyday Super account

I note that this notice can't be withdrawn or revoked, however I may vary it to reduce the amount covered by the notice (including to nil) before the earlier of the date that I lodge my tax return or 30 June of the financial year after the financial year in which I made the contributions.

Signature ✗ Date d d / m m / y y y y

If you are varying a previous deduction notice, please sign the declaration below

I confirm:

- The information given in this notice is correct and complete
- I'm a member of Suncorp Everyday Super and intend to claim the amount provided above as a tax deduction for the financial year provided above
- I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice

I confirm that either:

- I haven't lodged my income tax return for the relevant financial year and this variation notice is being lodged on or before 30 June in the financial year following the financial year the contribution was made or
- The Australian Tax Office has disallowed my claim for a tax deduction for the relevant financial year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed

This notice can't be withdrawn or revoked, however I may vary it to reduce the amount covered by the notice (including to nil) before the earlier of the date that I lodge my tax return or 30 June of the financial year after the financial year in which I made the contributions.

Signature ✗ Date d d / m m / y y y y

Where to send the form

Please send the completed form to	Suncorp Everyday Super GPO Box 2585 Brisbane QLD 4001
Or fax to	1300 172 693