

CATHOLIC SUPER

Tax File Number (TFN) Notification Form



Address: GPO Box 2163 Melbourne VIC 3001

Phone: 1300 550 273 **Fax:** (03) 9648 4720 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use **BLOCK** letters and black ink when completing this form. This request will be invalid if unsigned.

Section 1: Your personal details

Catholic Super Member Number	Date of Birth (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>
Mr/Mrs/Ms/Miss	Surname
<input type="text"/>	<input type="text"/>
Given Names	
<input type="text"/>	
Telephone (Business hours)	(Mobile)
<input type="text"/>	<input type="text"/>
I agree to provide my Tax File Number: <input type="checkbox"/> YES <input type="checkbox"/> NO Tax File Number <input type="text"/>	

Privacy - When your personal details are provided to the Catholic Superannuation Fund (CSF) they are securely stored and are accessible only to authorised personnel for the purposes of maintaining your account, including your death and disablement insurance arrangements. If you wish to view CSF's Privacy Statement please contact us on 1300 550 273.

Applicant's signature	Date (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>

Collection of tax file numbers is authorised by tax laws, the Superannuation Industry (Supervision) Act 1993 and the Privacy Act 1988. If you provide your Tax File Number it will only be used for legal purposes.

The purposes currently authorised include:

- taxing superannuation lump sum payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient other information is available;
- passing your Tax File Number to the Victorian Registrar of Unclaimed Monies where you have unclaimed superannuation money after reaching the aged pension age;
- passing your Tax File Number to the Australian Taxation Office; and
- allowing the Trustee of your superannuation fund to provide your Tax File Number to a superannuation fund or Retirement Savings Account receiving any benefits you may transfer. Your trustee won't pass your Tax File Number to any other fund or Retirement Savings Account if you tell the trustee in writing that you do not want them to pass it on.

Apart from these uses your Tax File Number will be treated as confidential.

You are not required to provide your Tax File Number. Declining to quote your Tax File Number is not an offence. However, if you do not give your superannuation fund your Tax File Number, either now or later:

- you may pay more tax on your superannuation benefits than you have to;
- it may be more difficult to locate or amalgamate your superannuation benefits in the future to pay you any benefits to which you are entitled;
- Catholic Super will not be able to accept any voluntary contributions from you;
- any superannuation contribution paid by your employer on your behalf will be accepted but will be subject to tax at the top personal marginal tax rate plus Medicare levy; and
- any payment of your benefits may be delayed.

The lawful purposes for which your Tax File Number can be used and the consequences of not quoting your Tax File Number may change in future, as a result of legislative change.

For more information, please contact the Australian Taxation Office Superannuation Helpline (13 10 20).

Return the completed, signed and dated application to: Catholic Super, GPO Box 2163, Melbourne VIC 3001

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