



Australian Government

Australian Taxation Office

Notice of intent to claim a tax deduction for super contributions or vary a previous notice

WHO SHOULD COMPLETE THIS NOTICE?

You should use this notice if you:

- intend to claim a tax deduction for your personal contributions, or
- want to vary a previous notice of intent you gave your super fund or retirement savings account (RSA) provider.

Your super fund or RSA provider may request the information in this notice:

- when you make your contribution
- at the end of the financial year, or
- as part of another form.

➤ When you decide whether to claim a deduction for super contributions, you should consider the effect on your super co-contribution eligibility. For more information on super co-contributions and tax deductions refer to *Super Co-contribution* (NAT 10596).

HOW DO I COMPLETE THIS NOTICE?

Section A: Your details

1 tax file number

Provide your tax file number (TFN). You don't have to provide your TFN, however, if you do, it will help them identify you correctly. (Also, if your fund doesn't already have your TFN, they may not be able to accept your contribution.)

2 Name

Provide your full name.

3 Date of birth

Provide your date of birth.

4 Current postal address

Provide your current postal address.

5 Daytime phone number

Provide your daytime phone number including the area code.

Section B: Contribution details

6 Fund name

Provide your fund name.

7 Fund ABN

Provide your super fund or RSA provider's Australian business number (ABN). You will find this in your product disclosure statement or member statement. You can also find your fund details on our Register of Complying Super Funds (ROCS) at www.ato.gov.au

8 Member account number

Provide your member account number for the fund. Your member account number in the fund is the account that has received your personal contributions.

9 Personal contribution details

Complete the details for the financial year you are claiming. Provide the total personal contributions you have paid to the fund and the amount of these contributions you want to claim as a tax deduction.

Section C: Declaration

There are two declarations to choose from:

- If you have not previously notified your fund that you are intending to claim a tax deduction for the personal contributions you have detailed in this notice, you need to complete the **Intention to claim a tax deduction declaration**.
- If you wish to vary a previous notice of intent, you need to complete the **Variation of previous deduction notice declaration**. You can apply for a variation if
 - you have not yet lodged your income tax return and it is on or before 30 June in the financial year following the year you made the contribution, or
 - we have disallowed your claim for a deduction and you are applying to reduce the amount claimed as a deduction by the amount that we have disallowed.

! You can only vary a previous notice of intent to **reduce** the amount you are claiming as a personal deduction.

HOW TO LODGE YOUR NOTICE

Send the completed form to your super fund or RSA provider. They will then send you an acknowledgment. Once your notice of intent to claim a deduction has been acknowledged, you cannot revoke or withdraw it, but you can apply to reduce it.

You must have received acknowledgment from your super fund or RSA provider before you lodge your income tax return. Once you have lodged your tax return you cannot apply to vary the amount you are claiming as a personal deduction, except if we have disallowed your claim for the deduction.

➤ MORE INFORMATION

For more information about super contributions:

- visit our website at www.ato.gov.au
- phone our information line on **13 10 20** between 8.00am and 6.00pm, Monday to Friday
- write to us at:
**PO Box 3100
PENRITH NSW 2740**

If you do not speak English well and want to talk to a tax officer, phone the Translating and Interpreting Service on **13 14 50** for help with your call.

If you have a hearing or speech impairment and have access to appropriate TTY or modem equipment, phone **13 36 77**. If you do not have access to TTY or modem equipment, phone the Speech to Speech Relay Service on **1300 555 727**.

