

# Asgard

Send the completed form to us via one of the following methods:

- Questions?** Call our Customer Relations team on 1800 998 185 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email [client.support@asgard.com.au](mailto:client.support@asgard.com.au)

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.asgard.com.au/privacy](http://www.asgard.com.au/privacy) 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 request.

## Account number

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[illegible][illegible][illegible]

## Title

[illegible][illegible][illegible]

State    Postcode

Contact number

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You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at [www.asgard.com.au/privacy](http://www.asgard.com.au/privacy) or by calling us.

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### 3. Personal contribution details

Is this notice varying an earlier notice? ☐ No ☐ Yes

If you answered '**No**' complete section 4, Original notice to claim a tax deduction and sign the declaration.

If you answered 'Yes' complete section 5, Variation of previous valid deduction notice and sign the declaration.

#### 4. Original notice to claim a tax deduction

Financial year ended 30 June 20  

My personal contributions to this fund in the above financial year

\$ ,,

The amount of these personal contributions I will be claiming as a tax deduction \$ \_\_\_\_\_

## Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

## INTENTION TO CLAIM A TAX DEDUCTION

**Complete this declaration if you have not previously lodged a valid notice with us for these contributions**

- > I declare that at the time of lodging this notice:
- I intend to claim the personal contributions stated as a tax deduction
  - I am a current member of the identified super fund
  - the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
  - I have not included any of the contributions in an earlier valid notice.
- > I declare that I am lodging this notice at the earlier of **either**:
- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
  - before the end of the income year following the year in which the contribution was made.
- > I declare that the information given on this notice is correct and complete.

Signature

\_\_\_\_\_

Date \_\_\_\_\_

Name (print in Block Letters)

[illegible]

Financial year ended 30 June 20

\$  ,   ,  .

[illegible]

\$,.

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

Complete this declaration if you have already lodged a valid notice for these contributions and you wish to reduce the amount stated in that notice

- > I declare that at the time of lodging this notice:
  - I intend to claim the personal contributions stated as a tax deduction
  - I am a current member of the identified super fund
  - the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.
- > I declare that I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice and I confirm that **either**:
  - I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or
  - I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, or
  - the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.
- > I declare that the information given on this notice is correct and complete.

Signature

\_\_\_\_\_

Date   /   |   |

Name (print in Block Letters)

[illegible]