

Tax file number notification

You can use this form to notify the trustee of your tax file number (TFN) for the purposes outlined below.

If you have any questions, please call us on **1300 880 588** or email **contactaon@pillar.com.au**. For more information go to our website **aonmastertrust.com.au**.

IMPORTANT INFORMATION

Legislation requires the trustee to ask whether or not you want to provide your TFN to the trustee. If you do provide your TFN, it will only be used for legal purposes. The purposes currently authorised for the use of TFNs include:

- taxing contributions, employment termination payments and superannuation benefits at concessional rates
- finding and amalgamating your superannuation benefits where insufficient information is available
- passing your TFN to the Australian Taxation Office (ATO):
 - where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age
 - to allow them to determine your eligibility for superannuation co-contributions
- allowing an employer to treat a TFN quoted for employment purposes as being quoted for superannuation purposes.

These purposes may be changed by future legislation.

Your TFN is confidential and you do not have to provide it to the trustee. If you do not provide your TFN to the trustee:

- you will not be allowed to make non-concessional contributions to your super
- you may pay extra tax on concessional contributions after 1 July 2007 (the extra tax is refundable if you provide your TFN within four years)
- you may pay extra tax on your super benefit (you may be able to claim the extra tax back when you lodge your tax return)
- it may be more difficult to find or amalgamate your benefits in the future.

The consequences of not providing your TFN to the trustee may also be changed by future legislation.

YOUR DETAILS

Member number

Title

Given names

Surname

Date of birth

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

YOUR TAX FILE NUMBER

Your TFN will be provided to any new fund to which you may later transfer, unless you advise us otherwise.

Tax file number

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Signature

Date

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PRIVACY

Personal information

The personal information that the Aon Eligible Rollover Fund collects is used to process your application, administer your account and provide you with benefits and options and conduct research about how to improve Aon Eligible Rollover Fund services and products.

Unless required or authorised by law, we will only provide your personal information to authorised service providers and other Aon companies who use the information to administer your account and provide services to you.

Marketing material

The Aon Eligible Rollover Fund may send marketing material to members about exclusive offers and promotions. For more information about privacy, including a copy of the Aon Eligible Rollover Fund privacy policy, call us on 1300 880 588.

YOUR DECLARATION AND AUTHORISATION

I understand that I do not have to provide my TFN. I am choosing to provide my TFN to the trustee:

- so that my non-concessional contributions can be accepted by the Trust
- so that any subsequent contributions and benefit payments may be taxed at concessional rates
- to facilitate the administration of my superannuation account
- to facilitate any other actual or proposed uses authorised by superannuation or taxation legislation.

Signature

Date

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