

SECURE SUPER ACCOUNT

Notice of intention to claim a tax deduction for personal contributions

Heritage Bank

Instructions

Please complete this form if you have made a contribution to your superannuation account and are intending to claim a tax deduction. Your notice of intention is subject to acceptance by Heritage Bank. Heritage Bank may not accept your notice of intention in certain circumstances. Eligibility criteria applies. For more information go to **www.ato.gov.au**

Please send us your completed form by ONE of the following methods:

Email superannuation@heritage.com.au

Post Secure Super Account, PO Box 190 Toowoomba Qld 4350

Please note: if you email the form, there is no need to send us the original.

Step 1 – Customer Details

Account number _____

Title _____ First name _____ Last name _____

Date of birth _____ Phone number (mobile) _____

Email _____

Step 2 – Super Fund Details

Fund name _____

Fund Australian Business Number (ABN) _____

Fund Unique Superannuation Identifier (USI) _____

Step 3 – Personal Contribution Details

Financial year ended 30 June _____ My personal contributions to this fund covered by this notice \$ _____

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

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

Note: If this is a variation of a previous deduction notice, you may only reduce the amount you advised.

Step 4 - Declaration (Complete either 4.1 OR 4.2 below, as applies to you)

4.1 INTENTION TO CLAIM A TAX DEDUCTION

I am lodging this notice before both of the following dates:

- The day that I lodged my income tax return for the year stated in step 3, and
- The end of the income year after the year stated in step 3

At the time of completing this notice:

- I intend to claim the personal contributions stated in step 3 as a tax deduction
- I am a member of the super fund stated in step 2
- My super fund stated in step 2 still holds these contributions
- This super fund has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included these contributions in an earlier notice
- I have provided information in this form that is true and correct

Signature _____ Date _____

OR

4.2 VARIATION OF PREVIOUS DEDUCTION NOTICE

Note: Use this declaration if you have already lodged a notice with us for these contributions and you wish to reduce the amount stated in that notice.

- I intend to claim the personal contributions stated in step 3 as a tax deduction
- I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice
- The information I have provided in this form is true and correct

I confirm that either:

- 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 the contribution was made, or
- The Tax Office has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.

Signature _____ Date _____