

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

This form must be received by us at the earlier of either the day you lodge your tax return for the year of contribution or the 30 June in the financial year after you've made the contribution. The notice must be received before you close your account.

Fields marked with an asterisk (*) must be completed in order for us to action your request.

My ClearView WealthFoundations Super or Pension account / (e.g. CSUP / 100000)

My ClearView Superannuation and Roll-overs account / (e.g. TSUP / 100000)

B. Contribution details

*Financial year ended 30 June 20

*My total personal contributions to this account in the above financial year \$.

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

*Is this notice varying an earlier notice? No (go to Part C, Option 1) Yes (go to Part C, Option 2)

C. Declaration and signatures

In signing one of the declarations on this form you should be aware that the law has changed to expand the administrative penalty provisions to include penalties for making false or misleading statements.

This may include making false or misleading statements to an entity other than the ATO if the statement is required or allowed to be made under tax law, for example, a notice of intent to deduct super contributions given to a super fund.

For more information about these penalties, refer to Superannuation and false or misleading statements at <https://www.ato.gov.au/>

*Complete and sign one of the following statements that applies to you:

Option 1: Intention to claim a tax deduction

Complete this declaration if you have not previously lodged a valid notice with your super fund 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 covered by this notice 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 of member

Date

Member full name (print clearly in block letters)

OR **Option 2: Variation of previous valid notice of intent**

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 of member

Date

Member full name (print clearly in block letters)

Sending your form

Please send the form to us via email or mail.

Mailing address:
ClearView Wealth
Reply Paid 4232
Sydney NSW 2001

Email address:
client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.