

Claim a deduction for SG contributions

Please read the Important Notes overleaf before completing this form. This form can only be used in respect of contributions made to Maritime Super or the Stevedoring Employees Retirement Fund (SERF) before it - call Member Services to learn more.

- Intention to claim a tax deduction** ➤ Complete this declaration if you have not previously lodged a Notice with Maritime Super (or SERF) for the contributions covered by this notice.
- Variation of previous deduction notice** ➤ Complete this declaration if you have already lodged a Notice with Maritime Super (or SERF) for the contributions on this notice and you wish to reduce the amount stated in that notice.

➤ Your personal details

Member Number Surname Given names

Postal address

Date of birth / / Membership category into which contributions were made Tax file number

➤ Contribution details

Fund Name Maritime Super (formerly known as Stevedoring Employees Retirement Fund)

Fund ABN 77 455 663 441

Financial year 01/07/ to 30/06/ ➤ If you do not specify the date, it will be taken as the financial year of the date you sign this notice

Period in respect of which this notice is issued* - select the option that applies:

Contributions attached to this notice - specify amount of contributions covered by this notice \$ OR

All contributions made to date for this financial year OR

All contributions made within the period (specify period) / / to / /

My total contributions covered by this notice \$

* You can only issue a notice in respect of contributions you have made, or are making, to the Fund. It does not cover future contributions you intend to make. If your notice covers contributions for a financial year, or a period to date, call Member Services to confirm the amount of contributions received for the period before completing this form.

➤ Member's declaration - sign the option that applies:

Intention to claim a tax deduction:

I am lodging this notice before the day that I lodge my income tax return for the year stated above and the end of the income year after the year stated above.

At the time of completing this notice:

- I intend to claim the personal contributions stated above as a tax deduction;
- I am a member of Maritime Super
- Maritime Super still holds these contributions; and
- I have not started a pension from Maritime Super using these contributions.

I have not included these contributions in an earlier notice. The information given on this form is correct and complete.

Signature

Date / /

Variation of previous deduction notice:

I intend to claim the personal contributions stated above as a tax deduction. I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice. I confirm that either:

- I have not lodged my income tax return for the relevant financial year and this notice is being lodged on or before 30 June in the financial year following the year the contribution was made; or
- the ATO has disallowed my claim for a deduction for the relevant financial year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.

The information given on this form is correct and complete.

Signature

Date / /

Important notes

Who can claim a tax deduction?

Only the self-employed and substantially self-employed (i.e. those who earn less than 10% of their combined assessable income and reportable fringe benefits from employment) are entitled to a tax deduction for personal contributions to a superannuation fund membership in their name.

The amount you can contribute and claim as a tax deduction is subject to the concessional contributions cap. Personal contributions which you do not claim as a tax deduction, and those which you claim as a tax deduction above the concessional contributions cap, will also be subject to the non-concessional contributions cap.



To learn about contribution caps and taxation, refer to the *Membership Supplement* for your membership category (available from the website or by calling Member Services on 1800 757 607).

What do I need to do to claim a tax deduction?

Complete this form and send it to Maritime Super. Once we have received this form, we will send you an acknowledgement which you will need when completing your income tax return.

You must lodge your form before all of the following:

- the day you lodge your income tax return for the financial year
- the end of the financial year following the date you made the contribution; and
- the day you withdraw or transfer the contributions (including to an income stream within Maritime Super) or cancel your Maritime Super membership.

When should I send my notice to Maritime Super?

You can complete this form each time you make a personal contribution that you intend to claim as a tax deduction. Alternatively, complete this form after you have made all your contributions for the year.

We will send you a new form for future contributions each time we acknowledge your personal contribution deduction.

Can I use this form in respect of contributions made to the Seafarers Retirement Fund before 1 March 2009 or the Teekay Shipping Superannuation Fund before 1 January 2010?

No – this form can only be used in respect of contributions made to Maritime Super or the Stevedoring Employees Retirement Fund before it. For more information, call Member Services.

Quoting your tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, Maritime Super is authorised to collect your TFN which we will treat as confidential and will only use for lawful purposes. These purposes may change in the future due to legislative change. We may disclose your TFN to another super provider when your benefits are being transferred, unless you request Maritime Super in writing not to. It is not an offence not to quote your TFN. Giving your TFN to Maritime Super will have the following advantages (which may not otherwise apply):

- we can accept all types of contributions to your account and you won't pay extra tax on contributions
- no additional tax will be deducted when you start drawing down your super benefits; and
- it will be much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.



Return this completed form by:

EMAIL

info@maritimesuper.com.au

FAX

(02) 9261 3683

POST

Maritime Super
Locked Bag 2001
QVB Post Office NSW 1230