

## Tax File Number Collection Form

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### How to use this form

Use this form if you wish to provide SMERF with your Tax File Number (TFN) for legal purposes.

### Important Notes

SMERF is required by law to advise you of the following before you provide us with your TFN.

It is not an offence if your TFN is not quoted, however if you do not provide your TFN then:

- More tax may become payable on your superannuation contributions and benefits than would otherwise be payable. (For SMERF this would include any Superannuation holding account special accounts (SHASA) or SG vouchers received from the ATO on your behalf)
- It may become more difficult to locate or amalgamate your superannuation benefits in the future to pay you any benefits you are entitled to.

The Superannuation Industry (Supervision) Act allows us to collect your TFN. If you provide your TFN to us, we will only use it for legal purposes, which include:

- Finding, identifying and amalgamating your superannuation benefits where other information is insufficient (including using the ATO Supermatch program which enables the fund to track down lost or unredeemed monies on your behalf).
- Calculating tax on any superannuation lump sums you may be entitled to.
- Calculating tax on superannuation contributions.
- Providing information to the Commissioner of Taxation (including disclosing your TFN).
- Providing it to another superannuation fund trustee or Retirement Savings Account provider to whom your benefits are to be rolled over, unless you request us not to do so in writing.

### Privacy

When your personal details are provided to SMERF, they are securely stored and are accessible only to authorised personnel for the purposes of maintaining your account. If you wish to view our privacy statement please go to [www.smerf.com.au](http://www.smerf.com.au).

### Declaration & Signature

You (the Member) must complete, sign and date the form and return it to the Administrator at SMERF.

### Contact Details

Super Money Eligible Rollover Fund  
Free call: 1800 114 380  
E: [smerf@diversa.com.au](mailto:smerf@diversa.com.au)  
W: [www.smerf.com.au](http://www.smerf.com.au)  
PO Box 1282 Albury NSW 2640



SUPER MONEY ELIGIBLE ROLLOVER FUND  
ABN: 94 334 023 289 SFN: 511 787 055 RSE: R1001372

## Tax File Number Collection Form

### Personal Details

Title: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Member Number: \_\_\_\_\_  
Surname: \_\_\_\_\_ Given Names(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_  
Home Number: \_\_\_\_\_ Mobile Number: \_\_\_\_\_  
Email: \_\_\_\_\_

### Tax File Number

My Australian Tax File Number is: \_\_\_\_\_

#### Consent to use TFN

*I give my permission to the SMERF to use my personal information provided (including TFN) to search for any Superannuation money held by the ATO or other Super funds, to the extent the law allows. SMERF will contact me and confirm the result of the search.*

Yes

No

### Member Declaration:

I declare that I have read the important notes about my tax file number and consent to provide my TFN for the legal purposes stated.

Member's Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

### Please return the completed Tax File Number Collection Form to:

Super Money Eligible Rollover Fund, PO Box 1282, Albury NSW 2640

[smerf@diversa.com.au](mailto:smerf@diversa.com.au), [www.smerf.com.au](http://www.smerf.com.au)

If you have any questions regarding this form or your membership, please contact Member Services team on 1800 114 380.

#### Office Use Only:

Reference: \_\_\_\_\_ Process / Eff Date: \_\_\_\_\_  
Administrator: \_\_\_\_\_ Authorised By: \_\_\_\_\_

Administered by Diversa Superannuation Services Limited (ABN: 77 107 165 962, AFSL No 273321) on behalf of Diversa Trustees Limited

PO Box 1282,  
Albury NSW 2640

Freecall: 1800 114 380  
Trustee: Diversa Trustees Limited

Website: [www.smerf.com.au](http://www.smerf.com.au)  
ABN: 49 006 421 638 AFSL: 235153

Email: [smerf@diversa.com.au](mailto:smerf@diversa.com.au)  
RSEL: L0000635