



# Downsizer contribution into superannuation form

- ! You must give this form (signed and dated) to your superannuation fund before or when your superannuation fund receives your contribution.
- ! Without this form, your contribution will be treated as a personal contribution and will count towards your contributions caps.

- > For more information on the eligibility requirements to make a downsizer contribution, see the following information:
  - [ato.gov.au/downsizing](http://ato.gov.au/downsizing)
  - Downsizer Law Companion ruling LCR 2018/9 *Housing affordability measures: contributing the proceeds of downsizing to superannuation*
 You can also phone the ATO on **13 10 20**.

## When completing this form

- Before you complete this form you should ensure you meet all of the eligibility requirements to make a downsizer contribution.
- Fill out all the sections of the form including signing the declaration.
- Print clearly in BLOCK letters.
- If you are the individual completing the form, you only need to complete sections A–D, section E is not required.

## Section A: Your superannuation fund details

### Your superannuation fund name

G & A Thomas Super Fund

Your member number

## Section B: Your details

Tax file number (TFN) 586 120 408

! The ATO does not collect the information provided on this form. This form is to assist you in providing details to your superannuation fund. Your superannuation fund is authorised to request your personal details, including your tax file number (TFN), under the *Superannuation Industry (Supervision) Act 1993*. It is not an offence not to provide your TFN, however if you do not provide your TFN and your superannuation fund does not already hold your TFN, they will not be permitted to accept the contribution. For more information about privacy, please contact the superannuation fund you are providing this form to.

### Full name

Title: Mr  Mrs  Miss  Ms  Other

Family name  Thomas

First given name  Gregory

Other given names  James

### Postal address

Street address  9 Martin Street

Suburb/town/locality  Gawler East

State/territory  SA

Postcode 5118

! Please ensure the ATO has your correct address.

Date of birth 09 / 08 / 1963

### Contact details

Daytime phone number (include area code)

0 4 0 8 0 5 6 3 4 1

Email address

gjthomas@tpg.com.au

## Section C: Your downsizer contribution

Amount of your contribution \$ 275,000

! Any amount over \$300,000 will not be accepted as a downsizer contribution.

## Section D: Your declaration

### Before you sign this declaration

By signing this form, you are confirming that you understand:

- A downsizer contribution is included as a superannuation asset for the age pension means test.
- You are not able to claim a personal superannuation contribution deduction for a downsizer contribution.
- If the ATO becomes aware that your contribution does not meet the downsizer eligibility requirements, the ATO will notify your superannuation fund and the fund will need to assess whether your contribution could have been made as a personal contribution.

Note: If your contribution could be accepted as a personal contribution, it will count towards the relevant contributions cap. If your contribution can not be accepted, your superannuation fund will return your contribution.

I meet all of the eligibility requirements to make a downsizer contribution and declare that the information contained in this form is true and correct.

! Providing false or misleading information on this form may result in the ATO imposing an administrative penalty.

Name (Print in BLOCK LETTERS)

Gregory James Thomas

Signature



Date

Day Month Year  
27 / 02 / 2023

## Section E: Agent, intermediary, authorised officer or authorised representative's declaration

I declare all of the following:

- This form has been prepared in accordance with information supplied to me by the applicant of this form.
- I have received a declaration from the applicant stating the information provided to me to complete this form is true and correct.
- I am authorised by the applicant to give this information to their superannuation fund.

! I understand that providing false or misleading information on this form may result in the ATO imposing an administrative penalty.

Name (Print in BLOCK LETTERS)

Signature

Date

Day Month Year  
/ /



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- ❗ You must give this form (signed and dated) to your superannuation fund before or when your superannuation fund receives your contribution.
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## Section A: Your superannuation fund details

### Your superannuation fund name

G & A Thomas Super Fund

Your member number

## Section B: Your details

Tax file number (TFN) 587 744 249

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### Full name

Title: Mr  Mrs  Miss  Ms  Other

Family name  Thomas

First given name  Alyson

Other given names  Mary

### Postal address

Street address  9 Martin Street

Suburb/town/locality  Gawler East

State/territory  SA  ▼

Postcode 5118

- ❗ Please ensure the ATO has your correct address.

Date of birth 20 / 04 / 1963

**Contact details**

Daytime phone number (include area code)

0 4 1 4 7 6 1 3 1 8

Email address

gjthomas@tpg.com.au

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**Before you sign this declaration**

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Note: If your contribution could be accepted as a personal contribution, it will count towards the relevant contributions cap. If your contribution can not be accepted, your superannuation fund will return your contribution.


I meet all of the eligibility requirements to make a downsizer contribution and declare that the information contained in this form is true and correct.

! Providing false or misleading information on this form may result in the ATO imposing an administrative penalty.

Name (Print in BLOCK LETTERS)

Alyson Mary Thomas

Signature



Date

Day: 27 / Month: 02 / Year: 2023

**Section E: Agent, intermediary, authorised officer or authorised representative's declaration**

I declare all of the following:

- This form has been prepared in accordance with information supplied to me by the applicant of this form.
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Name (Print in BLOCK LETTERS)

Signature

Date

Day: / / Month: / Year: