

**SUPERANNUATION**  
**INDIVIDUAL TAX FILE NUMBER NOTIFICATION VIA FUND TRUSTEE**  
This form may only be used to pass on your tax file number to your superannuation fund.

FUND NAME: Peter & Suzanne Kelly Superannuation Fund

FUND ADDRESS: 19 Young Street Wahroonga NSW 2076

TRUSTEE NAME: Manikato Investments Pty Ltd ACN 119 545 078

YOUR NAME: Peter Gregory Kelly

YOUR ADDRESS: 19 Young Street Wahroonga NSW 2076

DATE OF BIRTH: 30/05/1965

SEX: MALE ☒ FEMALE ☐

I agree to provide my Tax File Number YES ☒ NO ☐

My Tax File Number is: 149 303 367

Signature: \_\_\_\_\_

Date: 28 August 2014

Collection of tax file numbers is authorised by tax laws, the *Superannuation Industry (Supervision) Act 1993* and the *Privacy Act 1988*. Changes to the tax file number law require trustees to ask you to provide your tax file number for the purposes contained in the *Superannuation Industry (Supervision) Act 1993* and for the purposes of paying eligible termination payments.

- taxing eligible termination payments at concessional rates;
- finding and amalgamating your superannuation benefits where insufficient information is available;
- passing your tax file number to the Australian Taxation Office when you receive a benefit or having unclaimed superannuation money after reaching the aged pension age; and
- allowing the trustee of your superannuation fund to provide your tax file number to a superannuation fund receiving any benefits you may transfer. Your trustee will not pass your tax file number to any other fund if you tell the trustee in writing that you do not want them to pass it on.

You are not required to provide your tax file number. Declining to quote your tax file number is not an offence. However, if you do not give your superannuation fund your tax file number, either now or later:

- you may pay more tax on your superannuation benefits than you have to (you will get this back at the end of the financial year in your income tax assessment); and
- it may be more difficult to find your superannuation benefits if you change address without notifying your fund or to amalgamate any multiple superannuation accounts.

The lawful purposes for which your tax file number can be used and the consequences of not quoting your tax file number may change in future, as a result of legislative change.

For more information, please contact your fund or the Australian Taxation Office Superannuation Helpline (on 13 10 20).

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FUND NAME: Peter & Suzanne Kelly Superannuation Fund

FUND ADDRESS: 19 Young Street Wahroonga NSW 2076

TRUSTEE NAME: Manikato Investments Pty Ltd ACN 119 545 078

YOUR NAME: Suzanne Rae Kelly

YOUR ADDRESS: 19 Young Street Wahroonga NSW 2076

DATE OF BIRTH: 14/11/1965

SEX: MALE ☐ FEMALE ☒

I agree to provide my  
Tax File Number YES ☒ NO ☐

My Tax File Number is: 143 833 820

Signature: \_\_\_\_\_

*S. Kelly*

Date: 28 August 2014

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