

Document 5

Application for membership

DAME Superannuation Fund

The Trustee
DAME Superannuation Fund

I apply for admission to membership of the Fund and I:

- (a) agree to be bound by the Fund's trust deed as varied from time to time;
- (b) will upon request make full written disclosure of any information required by the Trustee about my membership of the Fund including my medical condition;
- (c) understand the terms of the trust deed particularly those about the benefits payable;
- (d) agree to the Trustee acting as trustee of the Fund; and
- (e) have read and understand the prescribed information about the collection of tax file numbers by the trustees of superannuation funds, and **attach** a completed Australian Taxation Office Individual Tax File Number Notification form.

Name	Melita Jane Smith
Address	72 Weston Drive, Bunya, Queensland 4055
Occupation	Teacher
Date of birth	20 November 1975

Nominated beneficiaries

For the purposes of the definition of 'Nominated Beneficiary' of the trust deed for the Fund, I nominate the undermentioned persons as my Nominated Beneficiaries:

Full name	David Ian Smith
Relationship	Spouse
Total benefit	100%

Signed by Melita Jane Smith on ^x 21 / 07 / 2011

▲

^x 
Signature of Melita Jane Smith

Attachment

Part 1

Details of other fund or plan memberships

- 1 Total number of other plans or funds or annuities: _____
- 2 Names of other plans or funds or annuities: _____
- 3 Trustees: _____
- 4 Address of Trustees: _____
- 5 Value of Accumulation Account or Members Credit or Benefit presently applicable to Applicant: \$ _____
- 6 Value of Preserved (including Productivity) Benefit: \$ _____

Part 2

Details of amounts (not being roll overs) previously received from superannuation funds, pension funds, approved deposit funds, roll over annuities and employers after 15 February 1990.

Total number of such amounts previously received: _____

Amount received: \$ _____ Date: _____

Name of Employer, Superannuation Fund, Approved Deposit Fund, Deferred Annuity: _____

Part 3

For any plans, funds or annuities listed in parts 1 or 2

Please complete details

- 1 (a) Was the Plan, Fund or Annuity employment related? **Yes/No**
- (b) Was the Plan, Fund or Annuity a personal arrangement? **Yes/No**
- (c) What date did you join? The _____ day of _____
- 2 List details of any undeducted or non-concessional contributions made after 30 June 1983, being contributions made by you and not claimed for income tax purposes.

Year	Amount
	\$

Superannuation

Individual Tax File Number Notification via Fund Trustee or Employer

This form may only be used to pass on your tax file number to your superannuation fund.
(Please print neatly in BLOCK LETTERS with a black or a blue pen only).

Fund Name:.....

Fund Address:.....

Fund Telephone No: ().....

Employer Name:..... Telephone No: ().....
(if applicable)

Your Surname/Family Name:.....

Given Names:..... Date of Birth:...../...../.....

Membership Number:..... Sex: Male ☐ Female ☐
(if known)

I agree to provide my Tax File Number: Yes ☐ No ☐

My Tax File Number: ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Signature: 

Date: 21 / 07 / 2011

Collection of tax file numbers is authorised by tax laws, the *Superannuation Industry (Supervision) Act 1993* (Cth) and the *Privacy Act 1988* (Cth). Changes to the tax file number law require trustees to ask you to give your tax file number to your superannuation fund. Completing this form and giving it to your fund allows your fund trustee to use your tax file number for the purposes contained in the *Superannuation Industry (Supervision) Act 1993* (Cth) and for the purpose of paying employment termination payments.

The purposes currently authorised include:

- taxing employment 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 where you receive a benefit or have unclaimed superannuation money after reaching the aged pension age; and
- allowing the trustee of your superannuation fund to give your tax file number to a superannuation fund receiving any benefits you may transfer. Your trustee won't pass your tax file number to any other fund if you tell the trustee in writing that you don't want them to pass it on.

You are not required to give 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; 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.