



**Mail: SMART Administration GPO Box 1424 Brisbane Qld 4001 Freecall: 1800 802 800**

**IMPORTANT:** Please use BLOCK letters and black ink when completing this form and ensure it is signed and dated.  
Attach any documentation before returning it to SMART.

### Section 1: Member details

SMART Membership Number	Date of Birth (DD/MM/YYYY)	
<input type="text"/>	<input type="text"/>	
Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone Number	<input type="text"/>	

### Section 2: Employment Questionnaire (for members aged 65-74)

#### A. Voluntary cashing benefits

The law allows you to access your superannuation benefits on or after age 65, even when you are gainfully employed. Do not close your account if you are still receiving employer contributions or intend making contributions.

Do you wish to withdraw your benefit?

YES  NO

If you answer YES please complete Section 3: Benefit Payment Options (overleaf).

You will need to provide proof of your age (certified copy of your driver's licence or birth certificate) before we will release your benefit.

#### B. Accepting personal and employer additional contributions in this financial year

Have you been gainfully employed at least 40 hours in not more than 30 consecutive days in the current financial year?

YES  NO

Note: **Maximum amount of voluntary contributions.** From 1 July 2007, the Government has imposed an annual cap of \$150,000. If your contributions exceed the cap in any one year, the Australian Taxation Office will send you an assessment notice and require you pay tax at the highest marginal rate on the excess amount.

#### Declaration

I declare that the information provided on this form is correct. I understand that, if I have not been gainfully employed for 40 hours in not more than 30 consecutive days in the current financial year, I can no longer make personal contributions or receive voluntary employer financed contributions (including salary sacrifice).

Signature



Date (DD/MM/YYYY)



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### Section 3: Benefit Payment Options

Please indicate below, your payment requirements in relation to your benefits (tick appropriate box)

<input type="checkbox"/> Payment to member (to be paid directly to you) (Please refer to the Tax File Number Notification section below)	Amount* to be paid: \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Partial payment (to be paid directly to you) (Please refer to the Tax File Number Notification section below)	Amount* to be paid: \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Rollover payment (Please refer to the Tax File Number Notification section below)	Amount* to be rolled over: \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of Superannuation Fund

Administrator of New Superannuation Fund

Superannuation Fund Number

**Postal Address of Administrator**

Street Number / PO Box	Street Name
<input type="text"/>	<input type="text"/>

Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Cheque to be made payable to

\*Please show amount(s) as 'all', 'balance' or a %, unless a specific amount is to be rolled over or paid to you.  
If you claim all or part of your benefit in cash, SMART will include any undeducted contributions and any concessional, capital gains tax exempt and invalidity components, unless you instruct us otherwise.

### Section 4: Tax File Number (TFN) Notification

We are required to tell you the following details before you provide your Tax File Number (TFN).  
The Trustee can collect your TFN under the Superannuation Industry (Supervision) Act 1993. You are under no obligation to provide your TFN, either now or later, and it is not an offence to not quote your TFN. However, if you don't tell us your TFN:

- From 1 July 2007, you may have to pay more tax than you need to on benefits such as Eligible Termination Payments (ETPs). This additional tax may be able to be re-claimed at your next tax assessment with the Australian Taxation Office.
- In addition, surcharge tax may apply to your benefit (which would otherwise not be payable).
- In the future, when we need to pay benefits to you, it may be more difficult for us to locate or amalgamate all the superannuation benefits you are entitled to.
- The consequences of not providing your TFN may change in the future as a result of legislative changes.
- SMART will not be able to accept any voluntary contributions from you.
- From 1 July 2007, Government legislation requires that contributions paid by your employer and any salary sacrifice contributions you make are taxed at the highest marginal rate.

- If you do tell us your TFN, we will treat it as confidential and use it for legal purposes, such as:
- To find your superannuation benefits, where other information is insufficient.
  - To calculate tax on any Eligible Termination Payment (ETP) you may be entitled to.
  - If we are paying unclaimed money, we must give your TFN to the relevant State authority.
  - Also we may give your TFN to the Commissioner of Taxation if you receive a benefit, or for the purposes of the Lost Member's Register.
  - If you wish to transfer benefits to another superannuation fund or Retirement Savings Account we would provide your TFN to the Trustee of that other fund or Retirement Savings Account provider. However, if you do not want us to do this, you can notify us in writing not to do so.

These purposes may change in the future as a result of legislative changes. More information about the use of tax file numbers for superannuation changes can be obtained from the Australian Taxation Office Superannuation Hotline 13 10 20.

My Tax File Number is  I do not wish to provide my Tax File Number

### Section 5: Authority and Declaration

By signing below I am authorising the Trustee to pay my benefit as indicated.  
Where the full balance of my account is to be paid from SMART, I release the Trustee from any further liability to me or my executors, administrators or dependants in respect of my membership in SMART and request and authorise the termination of my membership in the Fund.  
I declare that the information supplied by me on this form is correct.

Signature

Date (DD/MM/YYYY)