Notice of intent to claim a tax deduction

Use this form to claim a tax deduction on your next tax return for personal superannuation contributions you made to your smartMonday account (if you are eligible to do so). You can also use this form to change a previous claim for a tax deduction for personal contributions.

Important information

If you have any questions, please call us on **1300 614 644** or email **enquiry@smartmonday.com.au**

Claiming a tax deduction

- You may be able to claim a tax deduction on personal super contributions if you are a current smartMonday member under age 67, or between age 67 and 74 and meet the work test or qualify for the work test exemption. For more information about eligibility, see the Australian Taxation Office (ATO) website at **ato.gov.au** or call us.
- When deciding whether to claim a tax deduction for super contributions, you should consider whether you will exceed your concessional contribution caps. Contributions for which you claim a tax deduction will count toward your annual cap. You should also consider whether it will affect your eligibility for the Government's super co-contribution. For more information, see the Australian Tax Office (ATO) website **ato.gov.au**.
- If you withdraw or transfer a part of your super account balance it may reduce the amount you can claim as a tax deduction. If you had made withdrawals during the year, you may wish to seek advice on determining the correct amount to claim as a tax deduction. The ATO website provides guidance on this subject.
- You can only make one claim per financial year for tax deductions for personal contributions and you must make your claim before you file your tax return for that year.
- If any of your contributions during the year have been used to commence a retirement pension or transition-to-retirement pension, you won't be able to claim a tax deduction on those contributions.
- If you are intending to split part or all of your contributions with your spouse and you want to claim a tax deduction on those contributions, you must provide your *Notice of intent* form before submitting your application to split contributions.
- You can only claim a deduction once the Fund has acknowledged your *Notice of intent to claim a tax deduction* in writing.

Changing a previous notice to claim a tax deduction

- You can use this form to reduce an amount claimed as a tax deduction only if you have submitted a previous *Notice of intent to claim a tax deduction* form to the Fund for that same period.
- You cannot increase the amount you have claimed as a tax deduction in the Fund.
- You can reduce the amount you have claimed previously as a tax deduction **only** if you have not lodged your tax return for the relevant financial year **or** if the ATO has disallowed a previous claim you have made.

Your options

Please select the appropriate option.

☐ I wish to claim a tax deduction for personal contributions made to the Fund — over the page complete *Your details, Your contribution details* and *Your declaration to claim a tax deduction*.

☐ I wish to change a previous *Notice of intent to claim a tax deduction* — over the page *complete Your details, Your contribution details* and *Your declaration to change a previous claim*.

Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001

Your details

Member number (if known)

Date of Birth

Given names

Surname

Phone (mobile)

Email

Postal address

Suburb

State

Postcode

Your contribution details

Financial year ended 30 June

My total personal contributions for the financial year $

Amount of these contributions that I will be claiming as a tax deduction $

Your declaration to claim a tax deduction

Use this declaration if you have not previously lodged a notice with the Fund for these contributions.

I am lodging this notice before both of the following dates

- the day that I lodged my income tax return for the year stated above and
- the end of the financial year following the year stated above.

Intention to claim a tax deduction

I confirm that, at the date of lodging this notice:

- I am a member of the Fund stated above
- The Fund still holds the personal contributions for which I am claiming a tax deduction
- I have not lodged my income tax return for the financial year stated in *Your contribution details*

Your declaration to claim a tax deduction

- I intend to claim the personal contributions stated in *Your contribution details* as a tax deduction
- the trustee has not begun to pay a pension income that has been purchased using the contributions for which I am claiming a tax deduction
- I have not included these contributions in a previous *Notice of intent to claim a tax deduction*, and
- the information given in this form is true and correct.

Signature

Date

Your declaration to change a previous claim

Use this declaration if you are changing a previous *Notice of intent to claim a tax deduction* that you have lodged with the Fund.

I confirm that, at the date of lodging this notice:

- I wish to change my previous notice for these contributions by reducing the amount I advised in that notice
- I intend claiming a tax deduction for the personal contributions stated in *Your contribution details*
- I have not lodged my tax return for the relevant financial year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the contributions were made **OR** the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous notice by the amount that has been disallowed, and
- the information given in this form is true and accurate.

Signature

Date

Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001

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