

Tax File Number Form.



What's this form for?

To tell us your Tax File Number (TFN). If we don't have it on file, things get a bit complicated. For example, your super could be taxed much more than it should be. (If you'd rather not complete a form to tell us your TFN, just ring us on 1300 652 770.)

A few tips for you.

- Use blue or black pen
- Print within the boxes in clear BLOCK LETTERS
- Please use not
- Make sure you complete all relevant sections before sending us this form, otherwise we may not be able to process it
- Don't forget to include your signature where required

STEP 1 WHY WE NEED YOUR TAX FILE NUMBER (TFN)

Why?

It's not an offence to keep your Tax File Number (TFN) a secret from us, but a small thing called legislation means it makes money sense to give it to us – namely the Superannuation Industry (Supervision) Act 1993. Note that if legislation changes, the reasons why you'd give us your TFN, and why we'd keep it, may also change.

1. Your super savings are hit if we don't have your TFN.

- Deductible super contributions (e.g. compulsory employer contributions and salary sacrifice) may be taxed at the rather painful rate of 46.5%, instead of the usual 15%.
- You won't be able to make your own after tax contributions.

2. Useful things happen if we have it.

- Like the tax benefits mentioned above.
- We can tell the Australian Tax Office (ATO) things they need to know for taxation purposes – for example to help figure out your Reasonable Benefit Limit (RBL) or whether your contributions are assessable for the Superannuation Tax Surcharge.
- We can tell the ATO if your super's officially "lost" – this means that there's been no activity on your account for five years and we can't find you to ask what you'd like done with your super (FYI in these cases, your name is added to the Lost Member Registry and your super goes to what's called an Eligible Rollover Fund). We use Super Safeguard, for more details see the Virgin Super PDS.
- If you'd like to transfer your super to another regulated fund or retirement savings account, we can give them your TFN (you can send us a letter saying that you don't want this done).
- To advise the relevant State authority if we are paying unclaimed money.

STEP 2 YOUR VITAL STATISTICS AND TFN

Name	First											Last	
Virgin Super Member Number		TFN											
Contact phone number													
Email address													


STEP 3 SIGNATURE AND DECLARATION


"Declaring" means that you're telling us you've read this form and the PDS and that what you've said is correct and true.

By giving us your signature it means that you agree to us using your TFN for the legally authorised purposes. BUT, no matter how famous you get, we promise not to sell it on eBay or show it to anyone.

Signature		Date	/	/
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Note: Your TFN will be used or disclosed in accordance with the privacy statement in the Virgin Super PDS. You can get a copy of our privacy policy and the Virgin Super PDS by visiting virginmoney.com.au or by calling us on 1300 652 770. You can get more info on TFNs for superannuation purposes from the Australian Prudential Regulation Authority (APRA) on 1300 131 060 or the ATO on 13 10 20 or visit ato.gov.au

 Please post completed form to:
Customer Care Team
Virgin Super, Reply Paid 1489,
Wollongong DC, NSW 2500

 1300 652 770
8am – 6pm (EST)
Monday – Friday
if you need any help.