BT Financial Group

BT Lifetime Super – Employer Plan
Tax File Number

BT Customer Relations ✆ 132 135 (8am–6.30pm Mon-Fri, Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090 is the Trustee of BT Lifetime Super – Employer Plan RSE R1001327 ABN 39 827 542 991

- Legislation requires your employer to pass your Tax File Number (TFN) to the Trustee when you give your TFN to your employer on a TFN Declaration
- As an alternative to completing this form, you can lodge your TFN online at bt.com.au.

*Complete this form using **black pen** – print in clear **CAPITAL LETTERS***

1. MEMBER DETAILS

BT Employer number (7-8 numbers)

Employer name

BT Member number (12-13 numbers)

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number ( )

Mobile number

Email address*

** In the future, BT may elect to email correspondence to you*

2. TAX FILE NUMBER

Please provide your tax file number

Before providing your TFN to the Trustee, the Trustee is required to tell you that:

- the Trustee is authorised to collect your TFN under the *Superannuation Industry (Supervision) Act 1993*, from a range of sources including yourself, your employer or the ATO. You can, however, notify us in writing not to record your TFN
- it is not an offence not to provide your TFN; however, if you do not supply it you will not be able to make personal contributions to your account, and you may have to pay more tax than you would otherwise pay on your contributions to your account, and payments you receive from us. Furthermore, without your TFN it may be more difficult for us to locate your benefit
- your TFN will be used for legal purposes only, including finding or identifying your super benefits in the superannuation fund, calculating tax on super payments and providing information to the ATO. These purposes may change in the future
- if you provide your TFN, it may be provided to another super plan or retirement savings account provider that receives any transferred benefits in the future (unless you notify us in writing not to forward your TFN) and may also be given to the ATO

apart from the above uses, your TFN will be kept confidential.

Signature of **Member**

Date (dd/mm/yy)

You can submit this form by:

mail BT Lifetime Super – Employer Plan
GPO Box 2919, Adelaide SA 5001

fax (02) 9274 5402

03-17-007-02

DEC | 1 | BTF0030

BTF0030-0315px