



LIFE INSURANCE

Notice of intent to claim or vary a deduction for personal super contributions

If you want to change or make more than one claim, use a separate form each time. We respect your privacy and handle your information in accordance with our privacy policy, available at mlcinsurance.com.au/privacy-policy

Policy number

1. Your personal details

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐

First name

Middle name

Last name

Date of birth (DD/MM/YYYY)

Email

Home telephone

Business telephone

Mobile

Postal address

PO Box number

Unit number

Street number

Street name

Suburb

State

Postcode

Country

Super fund details

Fund name: MLC Super Fund

Fund ABN: 70 732 426 024

2. Your contributions

All sections must be completed.

Section 2A

Financial year ended 30 June

Your personal contributions to this fund in the above financial year

Section 2B

The amount of these personal contributions you will be claiming as a tax deduction

Note: The amount you intend to claim as a tax deduction cannot exceed the amount of personal contributions made to this fund in the nominated financial year.

Section 2C

Is this notice varying an earlier notice?

- ☐ No, complete section 3A.
☐ Yes, complete below and go to section 3B.

The amount of these personal contributions claimed in my original notice

Note: If you wish to increase the amount that you want to claim as a deduction, you can do so provided you are still within the time limits to lodge this notice of intent. However, you do not lodge a variation notice. Instead you must lodge a second notice specifying the **additional** amount you wish to claim and complete section 3A. For more information visit ato.gov.au

There may be limits to the amount you can claim as a result of withdrawals made during the financial year. To authorise this notice please complete Section 3.



MLC02FT

Trustee
NULIS Nominees (Australia) Limited
ABN 80 008 515 633 AFSL 236465

Fund
MLC Super Fund
ABN 70 732 426 024

Insurer
MLC Limited ABN 90 000 000 402
AFSL 230694

The Trustee is part of the Insignia Financial Group. MLC Limited uses the MLC brand under licence from Insignia Financial Group. MLC Limited is part of the Nippon Life Insurance Group and is not a part of the Insignia Financial Group.

3. Your authorisation

Please wait until you receive our acknowledgement of receipt before you lodge your tax return. For more information about deductions for personal contributions, please speak with your tax adviser or visit ato.gov.au

In signing one of the declarations on this form you should be aware that penalties may apply for making false or misleading statements that do not result in a shortfall amount. This may include making false or misleading statements to an entity other than the ATO if the statement is required or allowed to be made under tax law, for example, a notice of intent to claim or vary deduction for personal super contributions form given to a super fund.

Please complete and sign **one** of the below sections.

Section A

☐ **Intention to claim a tax deduction**

If you haven't previously lodged a notice with the fund for these contributions.

I'm lodging this notice at the earlier of either:

- the day that I lodged my tax return for the year stated in Section 2, and
- the end of the income year after the year stated in Section 2.

At the time of completing this notice:

- I intend to claim the personal contributions stated in Section 2 as a tax deduction
- I'm a member of MLC Super Fund and the fund still holds my contributions
- this super fund has not begun to pay a superannuation income stream based in whole or part on these contributions, and
- I have not included these contributions in an earlier notice.

The information given on this notice is correct and complete.

Signature

	Date (DD/MM/YY)			

Name (print in BLOCK LETTERS)

--

Section B

☐ **Variation of a previous deduction notice**

If you've already lodged a notice with the fund for these contributions and wish to reduce the amount.

I intend to claim the personal contributions stated in Section 2 as a tax deduction.

I wish to vary my previous notice for these contributions by reducing the amount advised in my previous notice. I confirm that:

- I'm a member of MLC Super Fund and the fund still holds my contributions, and
- this super fund has not begun to pay a superannuation income stream whole or part on these contributions.
- I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or
- I have not yet lodged my tax return for the year stated in Section 2 and this variation notice is being lodged on or before 30 June in the financial year following the year stated in Section 2, or
- the ATO has disallowed my claim for a deduction for the relevant year stated in Section 2 and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.

The information given on this notice is correct and complete.

Signature

	Date (DD/MM/YY)			

Name (print in BLOCK LETTERS)

--

4. Send us your form

Please return your completed, signed and dated form to:

MLC Life Insurance - Operations
PO Box 23455
Docklands VIC 3008

Email: enquiries.retail@mlcinsurance.com.au

If you have any questions, please speak with your financial adviser or call us on **13 65 25** from 8.30am to 6pm (AEST/AEDT), Monday to Friday. Alternatively, please visit mlcinsurance.com.au for more information.