

Mercy Super

Providing your tax file number

Don't pay more tax than you have to – let us know your tax file number

In line with the Superannuation Industry (Supervision) Act 1993, and various taxation acts, the Trustee of Mercy Super is authorised to ask for your tax file number. The Trustee will only use your tax file number for lawful purposes. These purposes may change in the future if there are changes to legislation.

The Trustee may pass your tax file number to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your tax file number:

- the Trustee will be able to accept all types of contributions made by or for you (some limits may apply)

- You can avoid paying tax at a higher rate than would otherwise apply on your super benefit and contributions, and
- it will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

Choosing not to provide your tax file number is not an offence. However, if you don't provide your tax file number, now or later:

- the Trustee will only be able to accept contributions made for you by your employer. No other contributions, for example after-tax contributions, can be accepted

- you may pay more tax on contributions made for you by your employer. In some circumstances, you may be able to claim back this additional tax, however time limits, fees and other rules may apply
- you may pay more tax on your super benefit than you would otherwise (although you can claim this back when you lodge your tax return).

If you need help

For assistance or to access the Privacy Policy and your personal information call Mercy Super on 1300 368 891.

Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1300 368 891.

Our Privacy Policies are available to view at www.mercysuper.com.au or you can obtain a copy by contacting us on 1300 368 891.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1300 368 891 or write to our Privacy Officer, PO Box 8334, Woolloongabba Queensland 4102



*Please print in black or blue pen,
in uppercase, one character per box.*



Title ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Date of birth / /

Given names

Surname

Member number

Name of your employer

Step 2 Provide your tax file number and sign the form

Tax file number: - -

By signing this form:

- I understand and consent to my information being collected, disclosed and used in the manner set out in this form
- I understand the circumstances in which my tax file number is collected and used.

Signature

Date _____

Please return your completed form to Mercy Super, PO Box 8334, Woolloongabba, QLD, 4102.

