

Advance Retirement Suite – Super/Pension

Tax File Number Notification

Trustee: BT Funds Management Ltd (BTFM) ABN 63 002 916 458 AFSL 233724

ADVANCE
ASSET MANAGEMENT

GUIDE TO COMPLETING THIS FORM

- > Complete this form in **BLOCK LETTERS** by typing directly into the form or using **black pen**, print and sign it.
- > Once completed, follow the instructions on the back page to return your form to Advance.
- > **Questions?** Call our Customer Relations team on 1800 819 935 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email investorservices@advance.com.au
- > **Note:** Privacy laws protect your privacy. Read our Privacy Policy for more information. You can obtain a copy from our website advance.com.au

1. ACCOUNT DETAILS

Account number

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Account type. Cross [X] the relevant box.

- Advance Super Account
 Advance Allocated Pension Account

Account name

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2. COMPULSORY NOTICE

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your Tax File Number (TFN), which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- > your superannuation fund will be able to accept all types of contributions to your account(s)
- > the tax on contributions to your superannuation account(s) will not increase

- > other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits, and
- > it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

3. TFN

Title

Mr Mrs Miss Ms Other

Given name(s)

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Surname

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My Tax File Number is

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4. SIGNATURE

Signature

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Date (dd/mm/yy)

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Dealer stamp

Adviser's phone

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SEND THIS COMPLETED FORM TO US:

Online: Using our secure Document Upload facility on Investor *Online* or AdviserNET (accessed from Forms > Document Upload menu)

By Post: Advance Asset Management
GPO Box B87, Perth WA 6838

By Email: investorservices@advance.com.au

By Fax: (08) 9481 4834

If you submit online, email or fax, you don't need to post us the original.

FOR FURTHER ASSISTANCE CONTACT:

CUSTOMER RELATIONS

1800 819 935

FAX

(08) 9481 4834

EMAIL ADDRESS

investorservices@advance.com.au

INTERNET ADDRESS

advance.com.au



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