



Perpetual Private Super Wrap

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458
Perpetual Super Wrap ABN 22 897 174 641 RSE R1074406

PERPETUAL PRIVATE SUPER WRAP DEDUCTION NOTICE FOR PERSONAL CONTRIBUTIONS

Use this notice if you intend to claim a tax deduction for your personal contributions or want to vary a previous notice you have already submitted.

PLEASE USE BLACK INK

Please note: There are some important requirements (including the work test or work test exemption for those age 67 and over) that must be met in order to claim a tax deduction for personal contributions. Please consult your adviser or a taxation professional for further information.

1. Client details

Account number

Account name

Tax file number (if not already provided):

2. Contribution details

Contributions made in the financial year ended 30 June 20

Total personal contributions

\$

Amount (covered by this notice) I will be claiming as a tax deduction*

\$

Is this notice varying an earlier notice?

☐

Yes**

☐

No

* If you have made **multiple contributions** in the year, this notice does not have to cover every contribution. Only include those contributions to which this notice will apply. If this notice covers multiple contributions, do not include any contribution covered by a previous notice this year.

** The amount you intend to claim as a tax deduction **cannot** be greater than the amount stated in the earlier notice. However, you are able to lodge a new notice for contributions that have not previously been covered by a deduction notice.

3. Declaration

If you have not previously lodged a notice with the fund for these contributions.

I confirm:

- ☒ I am lodging this notice before both of the following dates:
 - the day that I lodged my income 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,
 - the trustee has not begun to pay a pension based in whole or part on these contributions,
 - I have not included these contributions in an earlier notice,
- ☒ I understand that if I choose to vary this notice, I cannot increase the amount I intend to claim as a tax deduction, and
- ☒ the information given on this form is correct and complete.

If you have already lodged a notice with the fund for these contributions and wish to reduce the amount stated in that notice.

I confirm:

- ☒ 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 I advised in my previous notice. I confirm that either:
 - I have not yet lodged my income 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 Tax office 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. In the event that the disallowance is reversed, I agree to inform the trustee and acknowledge that this variation will be ineffective, and
- ☒ the information given on this form is correct and complete.

Signature (in black ink)

Name

Date

1. Read, understand and agree to all the conditions on this form.

2. Please sign the form.

3. Send this form to:

Perpetual Private Wrap

GPO Box 5230

Sydney NSW 2001 (please affix a stamp)

If you have any questions about completing this form – Clients please contact your financial adviser, Advisers please contact us on **1800 099 652**.

