



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

This form relates to the following products:

- MLC Combined Plan
- MLC Life
- MLC Life II
- MLC Link
- Blueprint
- Dimension
- Executive Dimension
- Personal Superannuation
- Financial Security Plan
- MLC Superannuation Plan
- Whole of Life & Endowment

If you want to changes or make more than one claim, use a separate form each time.

1. Your personal details

Account number

Customer number (if known)

Contact telephone (business hours)

Title
Mr Mrs Miss Ms Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Email

Postal address

Unit number

Street number

PO Box

Street name

Suburb

State

Postcode

Country

Super fund details

MLC Super Fund
ABN 70 732 426 024

2. Your contributions

Financial year ended 30 June

Your personal contributions to this fund in the above financial year \$

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.

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.

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
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The Trustee of the Fund is part of the National Australia Bank Limited (NAB) group of companies (NAB group). Your investment and insurance are not deposits or liabilities of, and are not guaranteed by, NAB. MLC Limited uses the MLC brand under licence. MLC Limited is part of the Nippon Life Insurance group and is not a part of the NAB group of companies.

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 a 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

Name (print in BLOCK LETTERS)

X	Date (DD/MM/YY)					

OR

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

Name (print in BLOCK LETTERS)

X	Date (DD/MM/YY)					

4. Send us your form

Please mail your completed, signed and dated form to:

MLC Super Fund
Reply Paid 2567
Melbourne VIC 3001

If you have any questions, please speak to your financial adviser, call us on **132 652** Monday to Friday between 8 am and 6 pm (AEST/AEDT) or visit mlc.com.au