



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

MLC Wrap  
MLC Navigator

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

## 1. Your personal details

Account number	Contact telephone (business hours)
<input type="text"/>	<input type="text"/>
Title	First name
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	<input type="text"/>
Middle name	Family name
<input type="text"/>	<input type="text"/>
Date of birth (DD/MM/YYYY)	Email
<input type="text"/>	<input type="text"/>

## Postal address

Unit number	Street number	PO Box	Street name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Suburb	State	Postcode	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Super fund details

Fund name: MLC Superannuation Fund  
Fund ABN: 40 022 701 955

## 2. Your contributions

Financial year ended 30 June	The amount of these personal contributions you will be claiming as a tax deduction	Is this notice varying an earlier notice?
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No, complete section 3A.
Your personal contributions to this fund in the above financial year	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.	<input type="checkbox"/> Yes, complete below and go to section 3B.
<input type="text"/>		The amount of these personal contributions claimed in my original notice
		<input type="text"/>
		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 <b>additional</b> amount you wish to claim and complete section 3A. For more information visit <a href="http://ato.gov.au">ato.gov.au</a>

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.

NULIS Nominees (Australia) Limited  
(Trustee of the Superannuation Fund)  
ABN 80 008 515 633  
AFSL 236465

MLC Superannuation Fund  
ABN 40 022 701 955

### 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](http://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 declare that I am lodging this notice at the earlier of **either**:

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions covered by this notice were made, **or**
- before the end of the income year following the year in which the contribution was made.

**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 the MLC Superannuation Fund.
- MLC Superannuation Fund currently holds these contributions and 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 valid notice.

I declare that the information given on this notice is correct and complete.

Name (print in BLOCK LETTERS)

Signature

X	Date (DD/MM/YY)					

OR

#### Section B

**Variation of a previous valid deduction notice**

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

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

- I intend to claim the personal contributions stated in Section 2 as a tax deduction.
- I'm a member of the MLC Superannuation Fund.
- MLC Superannuation Fund currently holds these contributions and has not begun to pay a superannuation income stream based in 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 valid notice by the amount that has been disallowed.

I declare that the information given on this notice is correct and complete.

Name (print in BLOCK LETTERS)

Signature

X	Date (DD/MM/YY)					

### 4. Send us your form

Please scan and email your completed, signed and dated form to us at [services@mlc.com.au](mailto:services@mlc.com.au), fax to 03 9869 1595 or you can mail it to:

MLC  
GPO Box 2567  
Melbourne VIC 3001

If you have any questions, please speak to your financial adviser, call us on 132 652 Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT) or visit [mlc.com.au](http://mlc.com.au)