

Notice of Intent to Claim or Vary a Deduction for Personal Super Contributions

Section A: Your Details

Tax File Number (TFN)

You don't have to provide your TFN to your superannuation fund. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name

First Given Name

Other Given Names

Date of Birth

Postal Address

Suburb

State

Postcode

Country if Outside of Australia

Daytime Phone Number

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be financial consequences if you do not. Refer to the Product Disclosure Statement for more information.

1. Please attach certified documentary evidence if your name has changed (i.e. marriage certificate, deed poll, etc).

IconiQ Super Wrap

A Division of WRAP Super ABN 18 906 079 389

GPO Box 1657, Melbourne VIC 3001 P: 1300 746 454 E: clientsupport@iconiqwrap.com.au USI 18906079389002

Issued by the Trustee of WRAP Super:

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFS Licence No 229757 RSE Licence No L0001458

Section B: Super fund's details

Fund Name

IconiQ Super Wrap

Fund ABN

18 906 079 389

Member Account Number

IQ

Unique Superannuation Identifier

18906079389002

Section C: Contribution details

Personal Contribution Details

Is this varying an earlier notice? ☐ No ☐ Yes

If you answered 'No' complete the Original Notice to Claim a Tax Deduction section below.

If you answered 'Yes' complete the Variation of previous valid notice of intent section below.

Original Notice to Claim a Tax Deduction

Financial year ended 30 June 20

My personal contributions to this fund in the above financial year

\$

The amount of these personal contributions I will be claiming as a tax deduction

\$

Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

Intention to Claim a Tax Deduction

Complete this declaration if you have not previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super 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 not included any of the contributions in an earlier valid notice.

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 were made, or
- before the end of the income year following the year in which the contribution was made.

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

Full Name of Member

Signature

Date

DDMMYYYY

Variation of Previous Valid Notice of Intent

Financial year ended 30 June 20

My personal contributions to this fund in the above financial year

The amount of these personal contributions claimed in my original notice of intent

The amount of these personal contributions I will now be claiming as a tax deduction

Privacy

When you provide instructions by completing this form, personal information about you is being collected. Information about how the Trustee collects, uses and discloses your personal information is set out in the Trustee's Privacy Statement, available at www.eqt.com.au/global/privacystatement.

Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to reduce the amount stated in that notice.

Variation of Previous Valid Notice of Intent

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.

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

- 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 income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, or
- the ATO has disallowed my claim for a deduction for the relevant year 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.

Full Name of Member

Signature

Date

Section E: Provide any additional information

How to return this form

Provide to your Adviser

Provide this form to your Financial Adviser to upload on your behalf via the IconiQ portal (Portfolios > Reports & Documents > Submit Superannuation Documents).