

Deduction Notice for Personal Superannuation Contributions

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

Use this Deduction Notice if you intend to claim a tax deduction for personal contributions made to the Macquarie Superannuation Plan or want to vary a previous Deduction Notice you have already submitted.

Important:

- A number of requirements (including the work test or work test exemption for those age 67 and over) must be met in order to claim a tax deduction for personal contributions. Please consult your adviser or tax professional or visit our **Help Centre** for further information.
- Contributions must be made before we can accept this Deduction Notice.

1. Member details

Member details

Member name:

Account number:

Financial year to which this Deduction Notice relates - year ended 30 June 20

2. Personal contribution amount



Please read this before completing the section

If you have made **multiple contributions** in the year, this Deduction Notice does not have to cover every contribution. Only include those contributions you intend to claim. If this Deduction Notice covers multiple contributions, do not include any contribution covered by a previous Deduction Notice this year.

If you are increasing the amount you wish to claim as a tax deduction, only include the additional amount you intend on claiming as a tax deduction.

If you are varying an earlier Deduction Notice, include the reduced amount you intend on claiming as a deduction.

Amount of personal contributions covered by this Deduction Notice that you intend to claim as a tax deduction: \$

3. Deduction Notice variation



If you are varying an earlier Deduction Notice, the amount you intend to claim as a tax deduction cannot be greater than the amount stated in the earlier Deduction Notice.

Is this Deduction Notice varying an earlier Deduction Notice?

Yes

No

4. Declaration

If you have not previously lodged a Deduction Notice with the Fund for these contributions

- I declare that I am lodging this Deduction Notice at the earlier of either:
 - before the end of the day that I lodged my income tax return for the financial year stated in section 1, OR
 - before the end of the financial year following the year stated in section 1.
- I declare that at the time of lodging this Deduction Notice:
 - I am a member of the Macquarie Superannuation Plan
 - the Macquarie Superannuation Plan currently holds these contributions
 - the Trustee has not begun to pay a pension based in whole or part on these contributions
 - I intend to claim the personal contributions stated in section 2 as a tax deduction, and
 - I have not included any of these contributions in an earlier Deduction Notice.
- I declare that the information given on this Deduction Notice is correct and complete.

If you have already lodged a Deduction Notice with the Fund for these contributions and wish to reduce the amount stated in that Deduction Notice

- I declare that at the time of lodging this Deduction Notice:
 - I am a member of the Macquarie Superannuation Plan
 - the Macquarie Superannuation Plan currently holds these contributions
 - the trustee has not begun to pay a pension based in whole or part on these contributions, and
 - I intend to claim the personal contributions stated in section 2 as a tax deduction.
- I declare that I wish to vary my previous Deduction Notice for these contributions by reducing the amount I advised in my previous Deduction 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 Deduction 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 year stated in section 1 and this variation Deduction Notice is being lodged on or before 30 June in the financial year following the year stated in section 1, OR
 - the Tax office has disallowed my claim for a deduction for the relevant year stated in section 1 and this Deduction Notice reduces the amount stated in my previous valid Deduction 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.
- I declare that the information given on this Deduction Notice is correct and complete.

Signature




Name

Date

Sign

- Wet signature, or
- Electronic signature from an approved provider.
Visit Adviser Help Centre to view our requirements.

Submit

-  Upload to **Request Centre** (advisers only)
-  Email to **wrapsolutions@macquarie.com**
-  Mail to **GPO Box 4045, Sydney, NSW, 2001**

Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online

If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063