

Excess concessional contributions Election form

Complete this form if you wish to release excess concessional contributions from your superannuation fund. It can also be used where an unsuccessful release has previously occurred and you want to choose a different fund/account. Please note:

- when completing the form, all fields are mandatory
- you are able to choose more than one superannuation fund
- the amount released will be used to pay any income tax liability you have and offset any outstanding tax or other Australian Government agency debts. The remaining amounts will be credited to you
- this election is irrevocable.

To make an election you must return this form to us within **60 days** of your excess concessional contributions determination issue date.

Refer to your excess concessional contributions determination or visit our website **ato.gov.au/supercaps** to find out more.

Completing this form

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

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lacksquare Place $egin{array}{c} \mathcal{X} \end{array}$ in ALL applicable boxes.



Section A: Personal details

- 1 Tax file number (TFN)
 - You don't have to provide the TFN to us. However, if you do, it will help us identify the member correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy

2 Name

Title:		Mr		Mr	s		Miss	М	s	Other	-												
Fam	ily r	name	9	•		_		•												_			
First	giv	en n	ame)									Oth	er gi	ven	nam	es						

Section B: Excess contributions details

- 3 Your excess concessional contributions amount stated on your determination
- 4 Date of your excess concessional contributions determination
- **Year of contributions** (eg. use 2019 for the 2018–19 financial year)

Section C: Superannuation fund details 6 Release details								
Superannuation fund name								
Superannuation fund ABN								
Unique superannuation identifier (if applicable)								
Member account identifier								
Election amount	\$,							
Superannuation fund name								
Superannuation fund ABN								
Unique superannuation identifier (if applicable)								
Member account identifier								
Election amount								
Tieodon amount								
Superannuation fund name								
Superannuation fund ABN								
Unique superannuation identifier (if applicable)								
Member account identifier								
Election amount	\$,							
TOTAL ELECTION AMOUNT	\$,							
The total election amount cannot exceed the maximum	n release amount provided to you on your excess concessional							

The total election amount cannot exceed the maximum release amount provided to you on your excess concessional contribution determination.

We are authorised by taxation law to collect information and to disclose it to other government agencies. You can find out more information about your privacy on our website ato.gov.au/privacy Complete the declaration that applies to you **ACCOUNT HOLDER DECLARATION** ■ I declare that the information contained in this election form is true and correct. ■ I acknowledge that this request is irrevocable. Name (Print in BLOCK LETTERS) Signature Date Contact number OR LEGAL REPRESENTATIVE DECLARATION I, the legal representative, declare that: I have prepared this document in accordance with the information supplied by the client I have received a declaration from the client stating that the information provided to me is true and correct ■ I am authorised by the client to give this election form to the Commissioner ■ The client who has supplied the information acknowledges this request is irrevocable. Name (Print in BLOCK LETTERS) Signature Date Contact number Tax agent number (if applicable) **Lodging this form**

Complete form and return to:

Australian Taxation Office PO BOX 3578 ALBURY NSW 2640

Section D: **Declaration**