



Application to fund my post-exit surcharge liability

Notes for applicants

Use this form...

- If you have received a post-exit surcharge assessment from the Australian Tax Office (ATO) and you wish to apply to have it measured against your surcharge cap and/or you wish to reduce your pension to pay that part of the assessment that lies below the surcharge cap.

It is important to understand the rules regarding your application.

We have Fact Sheets to help you with this understanding and to enable you to assess your eligibility to apply.

All applicants should read the following:

- *Information about the Commonwealth Contributions Surcharge*, STC Fact Sheet 1
- *Payment of Surcharge Assessments received after being paid a benefit or pension commencement*, STC Fact Sheet 12

Your Privacy

The information that you provide in this form is collected for State Super by the fund's administrator, Pillar Administration, in accordance with the *Privacy and Personal Information Act 1988 (NSW)* and the *Health Records and Information Privacy Act 2002 (NSW)*, under which you have rights of access and correction. Information you provide may be disclosed to lawfully authorised government agencies. For further information about privacy, contact Pillar Administration by writing to PO Box 1229 Wollongong 2500 or visit www.statesuper.nsw.gov.au for State Super's Privacy Statement.

How to apply

- ▶ In order to understand your eligibility, read the relevant Fact Sheet/s.
- ▶ You may wish to discuss your choices with your accountant or other financial advisor.
- ▶ Read the 'What to do next' section at the end of the form to understand what supporting documents you may need.
- ▶ Complete this form and attach any supporting documents that you are asked for.
- ▶ Send the forms to us:
State Super, PO Box 1229, Wollongong, NSW 2500

If you need help to complete this form

Contact Customer Service for the cost of a local call (unless calling from a mobile or pay phone). Select the appropriate contact number from the list below.

State Authorities Superannuation Scheme:..... 1300 130 095

State Super Scheme: 1300 130 096

Police Super Scheme: 1300 130 097

Pensions: 1300 652 113

Or contact us by e-mail: enquiries@stc.nsw.gov.au

1 Your details

Superannuation/Pension number

Title (eg Mr Mrs Ms Miss Dr)

Birth date

Family name

Given name/s

Postal address (please include postcode)

Suburb, Town, City

Postcode

Daytime contact telephone number

Email address

2 What are you applying for?

Mark one box with a cross:

I am in receipt of a pension:

- Please have my post-exit surcharge assessment measured against the 'cap' and commute part of my pension to pay my post-exit surcharge liability, **or**

- Please have my post-exit surcharge assessment measured against the 'cap'.

I am not in receipt of a pension:

- Please have my post-exit surcharge assessment measured against the 'cap'.

3 Details of your post-exit surcharge liability

This amount is the total of the post-exit surcharge assessment for which you are making an application.

Total post-exit surcharge assessment/s

(as per assessment notice/s)

4 Payment Details

Please indicate if you have already paid your post-exit surcharge assessment to the ATO.

Mark one box with a cross:

I have already paid my post-exit surcharge liability to the ATO. Please send a cheque for any payment that may be payable by the fund to the address provided.

I also acknowledge that any payment made will be a superannuation lump sum benefit for tax purposes.

I have not paid my post-exit surcharge assessment. Please direct any payment to the ATO.

5 Applicant: *please sign here*

I certify that the information provided in this form is true and correct.

Signature

Name

Date

DD	MM	YY
/	/	

What to do next

Prepare all supporting documents.

For **all** applicants the following supporting documentation is required:

- A certified copy[†] of the “Surcharge on Paid out Superannuation Contributions Notice” that was sent to you by the ATO.

If you have already paid your assessment you are required to provide:

- A certified copy[†] of a receipt from the ATO showing proof of payment of the applicable post-exit surcharge assessment.

If you have not already paid your assessment you are required to provide:

- A certified copy[†] of the Superannuation Account Statement that was provided to you by the ATO.

[†] Certified means that all copied pages of original proof of identity documents or change of name documents have been certified as true copies by an individual approved to do so. Persons who are authorised to certify documents must sight the original and the copies and make sure both documents are identical, then make sure that all copies are certified as true copies by writing or stamping ‘certified true copy’ followed by the individual’s signature, printed name, qualification and date.

The following persons are eligible to certify copies of original documents:

- An agent or permanent employee of Australia Post with two or more years of continuous service
- A finance company officer with two or more years of continuous service (with one or more finance companies)
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL) having two or more years of continuous service with one or more licensees
- A notary public officer
- A police officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of the court
- A magistrate
- A Chief Executive Officer of a Commonwealth Court
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership

All of the applicable documents must be provided in order for your application to be assessed. If you are not able to provide one or more of the above documents please contact Customer Service.

Attach documents to this form and post to:

State Super
PO Box 1229
Wollongong NSW 2500