

## 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:

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

#### How to apply

- You may wish to discuss your choices with your accountant or other financial adviser.
- 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:  
State Super, GPO Box 2181, Melbourne, VIC 3001

#### If you need help with this form

Contact Customer Service between 8:30 am and 5:30 pm AEST from Mon–Fri on [Deferred Benefits](#) 1300 130 094 or [SASS](#) 1300 130 095 or [SSS](#) 1300 130 096 or [PSS](#) 1300 130 097 or email [enquiries@stc.nsw.gov.au](mailto:enquiries@stc.nsw.gov.au)



## 4 Payment details

Mark one box with a cross.

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

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.

Name

Signature

Date (DD-MM-YYYY)

## What to do next

### Prepare all supporting documents.

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

- A certified copy<sup>†</sup> 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<sup>†</sup> 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<sup>†</sup> of the Superannuation Account Statement that was provided to you by the ATO.

<sup>†</sup> 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 and qualification.

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

- Australia Post Permanent Employee or Agent (who is currently employed with the post office & has at least 2 continuous years of service or is in charge of supplying postal services to the public)
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank Officer, Building Society Officer or Credit Union Officer (with 2 or more years of continuous service)
- Chiropractor
- Commissioner for Affidavits or Declarations
- Court Officer: Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- Dentist
- Fellow of the National Tax Accountants’ Association

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## Your privacy

The information you provide in this form is collected on behalf of and held for State Super by the scheme administrator, Mercer Administration Services (Australia) Pty Ltd, in accordance with STC's Privacy Statement, the *Privacy and Personal Information Protection Act 1998 (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 and third parties.

For further information about privacy, contact Mercer by writing to:

GPO Box 2181  
Melbourne VIC 3001

or visit

**[www.statesuper.nsw.gov.au](http://www.statesuper.nsw.gov.au)**

ABN 29 239 066 746  
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## What to do next (continued)

- Finance Company Officer (with 2 or more years of continuous service with one or more finance companies)
- Justice of the Peace
- Legal practitioner
- Marriage celebrant (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- Medical practitioner
- Member of Chartered Secretaries Australia
- Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority (State or Territory)
- Member of Engineers Australia (other than at the grade of student)
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Australian Defence Force (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service or a warrant officer within the meaning of that Act)
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Minister of Religion (registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- Notary Public
- Nurse
- Optometrist
- Officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees
- Officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- Patent attorney
- Permanent employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority) or a Local Government Authority with 2 or more years of continuous service
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Pharmacist
- Physiotherapist
- Police Officer, Sheriff's Officer or Sheriff
- Psychologist
- Senior Executive Service Employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority)
- Teacher employed on a full-time basis at a school or tertiary education institution
- Trade marks attorney
- Veterinary surgeon

### Attach documents to this form and post to:

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MELBOURNE VIC 3001

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