

Tax file number notification



Complete this form in **BLOCK LETTERS** by typing directly into the form or using **black pen**, print and sign it.

Send the completed form to us via one of the following methods:

- > submit a copy via our secure Document Upload facility on Investor *Online* or AdviserNET (accessed from Forms > Document Upload menu)
- > post to Asgard, PO Box 7490, Cloisters Square WA 6850
- > email a copy to asgardforms@asgard.com.au

Alternatively, you can submit this request via Investor *Online* or ask your adviser to lodge it on your behalf on AdviserNET.

If you submit online or email, you don't need to post us the original.

Questions? Call our Customer Relations team on 1800 998 185 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email client.support@asgard.com.au

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at bt.com.au/privacy/privacy-statement or by calling us on 132 135. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application.

1. Account details

Account number

Account name

Account type (tick one):

☐ Super/Pension - complete Section 2 ☐ Investment - complete Section 3

2. Tax File Number – for Super/Pension accounts

You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at bt.com.au/privacy/privacy-statement or by calling us on 132 135.

Tax file number (TFN)

3. TFN/ABN – for Investment accounts

You are not obliged to provide us with your Tax File Number (TFN). However, if you do not provide us with your TFN we are required to deduct tax from your distribution at the highest marginal rate to meet Australian Taxation Office (ATO) requirements, unless you claim an exemption or provide your ABN. Please contact the ATO for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at bt.com.au/privacy/privacy-statement or by calling us on 132 135.

3. TFN/ABN - for Investment accounts (continued)

Individual/joint applicants*

Applicant 1 name

TFN/exemption code -- **OR**

ABN ABN branch number (if applicable)

Applicant 2 name

TFN/exemption code -- **OR**

ABN ABN branch number (if applicable)

Companies/Trusts (Enter company/trust TFN/ABN)

Account name

TFN/exemption code -- **OR**

ABN ABN branch number (if applicable)

* Joint applications should provide a TFN/ABN for each investor. Only joint applicants registered as a single business entity should supply a single ABN.

4. Signatures

Individual/joint account holders/trustee(s) sign here

If the account is in joint names, all account holders must sign. If there are more than two trustees attach additional signatures.

Signature

Date

Signature

Date

Companies or trustee companies sign here

If signing under common seal, we confirm it was affixed in our presence.

Signature – Director/Sole Director and Sole Secretary (delete as applicable)

Signature – Secretary/Director (delete as applicable)

Date

Common seal