



Application to have pre-July 1983 excess contributions included in tax-free amount

Once you have completed this form, please forward it to:

CSS
Pensions administration section
PO Box 22
Belconnen ACT 2616



Explanatory notes

Get the facts first

Before you complete this form, please read the **Taxation concessions for pensions** fact sheet which is available at www.css.gov.au

Who should use this form?

You should use this form if you are receiving a CSS pension and need a recalculation of your tax-free amount which includes your pre-July 1983 excess contributions.

When to use this form

You will need to use this form if you have not already told us about your pre-July 1983 excess contributions. If you have already let us know about your pre-July 1983 excess contributions, we have already converted this amount to a tax-free amount.

Definitions

Pre-July 1983 excess contributions: Contributions made to the CSS before 1 July 1983 which, together with life insurance premiums (if any), exceeded an annual limit of \$1,200. The Australian Taxation Office (ATO) holds pre-July 1983 excess records.

Tax-free amount: The tax-free amount is based on the member contributions you made after July 1983, together with any pre-July 1983 excess contributions that you applied to your pension. Please note you are not eligible for an increase in your tax-free amount if you have already elected to receive your pre-July 1983 excess contributions as part of a lump sum instead of a pension. In addition, you must have started receiving your pension before 1 July 1994.

Documents from the Australian Tax Office

As records of your pre-July 1983 excess contributions are held by the ATO, you will need to ask the ATO to issue you with a current letter stating the value of these excess contributions.

You can request this letter from the ATO by phoning **131 020** or by writing to:

The Australian Taxation Office
Superannuation Business Line
PO Box 3100
Penrith NSW 2740

If your pension commenced prior to 1 July 1983 you will instead need to ask for a letter stating your deductible amount. Please note that the documentation issued by the ATO must be current.

Please forward this information to ComSuper. We will then recalculate your tax free amount and provide you with an amended payment summary for the 2007/08 financial year (and any subsequent financial years, if applicable), together with details of your new tax components.

If you are receiving a Reversionary Pension please obtain a letter directly from the ATO confirming the value of your late spouse's pre-July 1983 excess contributions.

Privacy

We are committed to protecting any information you give us. We will use your contact information to confirm your identity and to contact you about your tax-free amount and CSS pension.

If you authorise us to seek the value of your pre-July 1983 excess contributions directly from the ATO, we will give the ATO a copy of this completed form containing your written permission and personal identifiers, including your tax file number (TFN).

We are collecting the information on this form to:

- > confirm your identity
- > assess your eligibility for payment/rollover of the benefit
- > pay your benefit or to roll it over
- > contact you.

We are committed to protecting any personal information we hold about you. Your information will not be used for any other purpose or disclosed to another party unless:

- > you authorise us to
- > the disclosure is authorised by law. This may include disclosing your personal information to other government agencies that have specific legislative authority to collect this information (for example the ATO, Centrelink or the Department of Veterans' Affairs). We will not disclose your personal information to these agencies unless it is lawful to do so.

Where can I get more information?

Telephone: 1300 001 777

Fax: 02 6272 9614

Write to: CSS
Pensions administration section
PO Box 22
Belconnen ACT 2616

Email: pensions@css.gov.au

Internet: www.css.gov.au

When contacting us, please remember to quote your reference number.

