



How to claim or vary a Tax Deduction for Personal Super Contributions

Introduction:

In Australia, you can claim a tax deduction for personal superannuation contributions to increase your retirement savings while reducing your taxable income.

Here's a step-by-step guide on how to claim a tax deduction for a personal super contribution.

Your two choices are:

- **Notice of Intent to claim a tax deduction – complete this declaration if this is an original notice, or an additional notice to increase the amount you intend to deduct.**
- **Variation of previous valid notice of intent – complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to reduce the amount stated in that notice.**

How do I complete this notice of intent?

Download the form linked below.

[Notice of intent to claim or vary a deduction for personal super contributions | Australian Taxation Office \(ato.gov.au\)](#)



See further below.

Section A: Your details

Provide the following personal details so your super fund can identify you:

Tax file number (TFN)

Name

Date of birth

Postal address

Daytime phone number (including the area code).

Section B: Super fund details

Provide your super fund's details:

Fund name

Fund Australian business number (ABN)

Member account number that your personal contributions are held in.

Unique superannuation identifier (USI) – if known.



Section C: Contribution details

10 Personal contribution details

Is this notice varying an earlier notice? No Yes

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.
If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

ORIGINAL NOTICE TO CLAIM A TAX DEDUCTION

11 Financial year ended 30 June 20

12 My personal contributions to this fund in the above financial year \$, .

13 The amount of these personal contributions I will be claiming as a tax deduction \$, .

Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

INTENTION TO CLAIM A TAX DEDUCTION

! Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice at the earlier of either:

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, **or**
 - before the end of the income year following the year in which the contribution was made.
- I declare that the information given on this notice is correct and complete.*

Name (Print in BLOCK LETTERS)

Signature

Date

Day: / Month: / Year:

> Send your completed notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20

15 My personal contributions to this fund in the above financial year \$, .

16 The amount of these personal contributions claimed in my original notice of intent \$, .

17 The amount of these personal contributions I will now be claiming as a tax deduction \$, .

