



# Authorising Hostplus to provide a written declaration to the ATO.

## For inactive low-balance accounts

October 2020

### When to use the form?

You should complete this form if you have an inactive low-balance account and want this account to remain with Hostplus. Your Hostplus account will be considered to be an inactive low-balance account if:

- no amount has been received for crediting to that account for your benefit within the last 16 months;
- it has a balance of less than \$6,000;
- it has no insurance attached to it; and
- you have not met a prescribed condition of release.

If your inactive low-balance account remains with Hostplus your retirement savings will continue to be subject to fees and charges.

By authorising Hostplus to provide a written declaration to the ATO, your inactive low-balance account will stay with Hostplus and the ATO cannot consolidate this account on your behalf.

Once Hostplus receives this form, we will notify the ATO that you are not a member of an inactive low-balance account.

### Things you should know

Hostplus needs to receive this form 30 days before the statement dates. These are the dates when Hostplus is required to report and pay your account to the ATO. They are on either 31 October or 30 April of each year.

Your authorisation for Hostplus to provide a written notice on your behalf declaring that you're not a member of an inactive low-balance account is not enduring.

This means if your account again meets the definition of an inactive low-balance account in the future, and you do not want this account transferred to the ATO, you will need to complete a new authorisation.

Visit the ASIC MoneySmart website for more information or consult your financial advisor if you require advice on how to manage your super.

Hostplus' licensed financial advisers\* can provide expert guidance and advice to help our members get the most from their superannuation and to reach their goals, for today and tomorrow. Visit [hostplus.com.au/advice](https://www.hostplus.com.au/advice) today to learn more.

### Privacy statement

Hostplus is seeking to collect your personal information in order to carry out your instructions in this form. If you do not provide us with the information requested, we may not be able to carry out instructions or provide the services you require. For further information about how personal information is handled and how you can access and correct your personal information, you can view the Hostplus Privacy Policy at [hostplus.com.au/privacy](https://www.hostplus.com.au/privacy) or by calling us on 1300 467 875.

### About the form

There are three sections to the form. You will need to complete all sections.

**Section A** asks you to provide us with your personal details.

**Section B** asks you to provide details of the account or accounts held by Hostplus for which you are authorising us to provide a written declaration to the ATO on your behalf.

**Section C** provides a declaration that you are not a member of an inactive low-balance account and the authority for Hostplus to act on your behalf for the purposes of giving the ATO a written notice to that effect.

You should check that all of the details you have provided are complete and correct before you sign and date the form.

### When completing this form

- Complete using blue or black pen
- Print clearly in block letters
- Place an X in the relevant box if authorising Hostplus to act on your behalf.

### Find out more

Phone 1300 467 875 between 8am-8pm AEST Monday to Friday.

\*Hostplus has engaged Industry Fund Services Limited (IFS) ABN 54 007 016 195, AFSL 232514 to facilitate the provision of personal financial advice to members of Hostplus. Advice is provided by financial planners who are Authorised Representatives of IFS. Fees may apply. Further information about the cost of advice is set out in the relevant IFS Financial Services Guide, a copy of which is available from your financial planner.

## A Your details

Title  Mr  Mrs  Ms  Dr       Other

Date of birth

Given names

Surname

Current address

Suburb                    State    P/C

Country if outside Australia

How can we contact you or leave a message if we need more information? A preferred contact number must be provided. (Country code) (Area code) (Phone number)

Email address

## B Superannuation Fund details

### Details of your super account

You will need current details of your Hostplus account to complete this section. You can find your member number on your Hostplus Member Statements, as well as some emails and letters from Hostplus.

Fund name

Fund ABN

Unique superannuation identifier (USI)

Your member account name

Your member account number

## C Authorisation

### Member authorisation

I declare that I am not a member of an inactive low-balance account and authorise Hostplus to act on my behalf in giving a written notice to this effect to the Commissioner of Taxation.

Name (print in BLOCK LETTERS)

Signature of applicant\*

Date\*

### Lodging this form

When you have completed this form please send it to: **Hostplus, Locked Bag 5046, Parramatta NSW 2124**