

ClearView Managed Investments – Tax File Number/Exemption details

Your Investment number

Section A: Investor details

OFFICE USE ONLY Identity No.
<input type="text"/>

Investor

Mr Mrs Miss Ms Other

Given name(s) Surname

Home phone number () Work phone number ()

Address
 Postcode

Joint Investor

Mr Mrs Miss Ms Other

Given name(s) Surname

Home phone number () Work phone number ()

Address
 Postcode

OR Company, Trust or Partnership name

ACN/ARBN/ABN Please circle

Contact phone number ()

Address
 Postcode

Note Where there are more than two investors, please attach a sheet providing the details of the additional investor details, however we only require the Tax File Numbers and/or exemptions of two investors.

Section B: Tax File Number / Australian Business Number details

1 Tax File Number (TFN)

If you have an Australian Business Number (ABN) and are making this investment in the course of a business or enterprise, you may quote your ABN as an alternative to your Tax File Number. Please circle the relevant number quoted. If claiming an exemption refer to Section 2 overleaf. Please tick the box applicable to you and complete the appropriate details.

Personal

TFN/ABN

Joint investment

Name 1

TFN/ABN

Name 2

TFN/ABN

Partnership

Partnership name

The Partnership TFN/ABN

Trust accounts

Trust name

TFN/ABN

The Trust TFN/ABN should be entered if the Trust lodges a tax return. If the Trust does not lodge a tax return, the Trustee's TFN/ABN should be entered in either the personal or company sections.

Company

Company name

TFN/ABN

2 Exemption reason

- I receive the Age, Service or Disability Support Pension
- Other pension (Wife, Carer, Widow, Sole Parent, Special Needs or Special Benefit Pension)
- Association etc. - an entity not required to lodge a tax return
- Territory resident
- Non resident of Australia (please specify country of residence)

Declaration

I/We authorise the application of this Tax File Number/exemption or Australian Business Number (ABN) to this and subsequent investments within this investment.

If there is more than one investor, all investors must sign. For a company, the signature of two directors, or a director and a company secretary are required.

If signed under the Power of Attorney, the Attorney verifies that no notice of revocation of that power has been received.

Signature 1	
X	DATE / /

Signature 2	
X	DATE / /

Company seal (if applicable)

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Tax File Number Collection form

- It is not an offence if you decide not to supply us with your Tax File Number.
- If you do not supply us with your Tax File Number, tax will be deducted from your income earned at the highest marginal tax rate plus Medicare levy, and forwarded to the Australian Tax Office.
- These deductions will appear on your statements as 'TFN Tax' or 'Withholding Tax' in the Transaction details column.
- If you are exempt from quoting your Tax File Number you must indicate this or tax will be deducted from your income.
- The collection of Tax File Number information is authorised and its use and disclosure are strictly regulated by the tax laws and the Privacy Act.
- Your Tax File Number will be applied automatically to any future investments in the Trust unless you indicate at any time that you do not wish to quote it for a particular investment.
- For more information about the use of Tax File Numbers read the Australian Tax Office booklet 'New Tax Rule for Savings Accounts and Investments'.



This form can be posted (no stamp required) to:

ClearView Retirement Solutions
Client Operations
Reply Paid 3382 – GPO Box
Sydney NSW 2001



**If you have any questions about this form,
please call us on**

132 977