



EY01-2015

Choice to include excess concessional
contributions in assessable income

^AWR **^BGF**

Tax File Number (TFN)

^AAD

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other **^ABE**

Surname or family name

Suffix

^ABF **^BAW**

First given name

Other given name

^ABG **^BBB**

Complete this form to have your excess concessional contributions included in your assessable income and taxed at your marginal tax rate.

We will give you a 15% credit for the tax paid by the super fund on your excess concessional contributions. We will ask your super fund to release the remaining 85% of your excess concessional contributions and use this to pay your tax liability (if any). The balance may be used to offset any outstanding tax or other Australian Government agency debts you already have.

Once you have completed sections A and B, send this form to the ATO **within 28 days** of the issue date on the enclosed letter.

Excess concessional contributions amount:

\$c

Financial year in which the release amount will be included as assessable income:

^JYE

^JYF

Section A: Super fund details

1. Place an ☒ in the box that applies to you:

- ☐ I acknowledge the ATO will ask the super fund nominated below to release 85% of my excess concessional contributions from my accounts.
Super fund name:
Super fund ABN:
Member account number:
Member identifier number:

^JYG

^ARC

^EBN

^BSD

^BSE

OR

- ☐ I declare that (Place an ☒ in the box that applies to you):
- ☐ I no longer hold an interest in the super fund nominated above
- ☐ the value of my interest in the super fund nominated above is less than 85% of my excess concessional contributions amount
- ☐ my interest in the super fund nominated above is a defined benefit interest
- ☐ my only interest in the super fund nominated above is a superannuation income stream.

^JYH

^JYI

I nominate the following super fund to release 85% of my excess concessional contributions amount. The ATO will ask this super fund to withdraw my excess concessional contributions amount unless it falls into one of the categories above.

Super fund name **^JYJ**

Super fund ABN **^JYK**

Member account number **^JYL**

Member identifier number **^JYM**

The information you need to complete these details is on your annual benefit statement provided by your super fund.

OR

- ☐ I declare that I no longer hold an accumulation interest in any super fund.
I understand the ATO will amend my income tax assessment and send a *Notice of amended assessment* and *Statement of account* showing the amount of tax payable (if any) which cannot be paid from my super fund. I understand I am responsible for the payment of this amount.

^JYN

☐ I declare that the super fund nominated above holds my tax file number (TFN).

Section B: Declaration

[illegible]

^ACR

Contact phone number

***** NOTE *****

THIS FORM CANNOT BE LODGED WITH THE ATO AS A PAPER REPRESENTATION OF THE FORM.
FOR PAPER LODGEMENT PLEASE USE THE PRE PRINTED FORMAT ISSUED BY THE ATO.
