

Inactive Low Balance Account – Authorisation for ATO Declaration



Fire & Emergency Services
Superannuation Fund

When to use this form?

Under federal legislation your Fire and Emergency Services Superannuation Fund (FES Super) account will be considered inactive and transferred to the Australian Taxation Office (ATO) if your account balance is below \$6,000 and within the last 16 months:

1. we haven't received a contribution to your account; and
2. you haven't switched your investments, changed your insurance, made or updated a binding beneficiary nomination or told us in writing that you don't want your account to be transferred to the ATO.

This is called an 'inactive low balance' account.

You should complete this form if you have an inactive low balance account and you want it to remain with FES Super. This form remains valid for 16 months.

We will then provide a written declaration to the ATO about your wishes, your inactive low balance account will stay with FES Super and the ATO cannot consolidate this account on your behalf.

If your inactive low balance account remains with FES Super, your retirement savings will continue to be subject to fees and charges.

Things you should know

FES Super must receive this form 30 days before the statement dates which are 31 October and 30 April of each year. These are the dates when FES Super is required to report and pay inactive low balance accounts to the ATO.

Your authorisation for FES Super to provide a written notice to the ATO on your behalf declaring that you are not an inactive low balance account holder 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 ASIC MoneySmart website at <https://www.moneysmart.gov.au/> for more information or consult your financial advisor if you require advice on how to manage your super.

About the form

There are two sections to the form. You will need to complete both sections.

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

Section B provides a declaration that you wish for your inactive low balance account to remain with FES Super and you authorise FES Super to give 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 FES Super to act on your behalf.

Find out more

Phone FES Super on (08) 9382 8444 for more information.

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Fire & Emergency Services
Superannuation Fund

SECTION A: Your Details

Member Number

Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)* Surname

Given Names

Daytime Phone Number

Date of Birth

Home Address

Postcode

Postal Address *(if same as above, write N/A)*

Postcode

Personal Email Address *(we will use this to contact you)*

SECTION B: Authorisation

I declare that I wish for my inactive low balance account that is less than \$6,000 to stay with FES Super and I authorise FES Super to give written notice to this effect to the Australian Taxation Office.

Member Signature

Date

FES Super to complete

Signature verified

Member details checked

Date Received

Admin Officer

We are committed to respecting the privacy of personal information you give us. If you would like a copy of FES Super's Privacy policy, visit fessuper.com.au, email admin@fessuper.com.au or call (08) 9382 8444.