

# Inactive low-balance account declaration



Completing this form authorises the Fund to send the Australian Taxation Office (ATO) a written notice that you are not a member of an inactive low balance account and that you would like it to remain with the Fund. This means that your account will not be sent to the ATO.

Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. If you have any questions, please contact our Member Support Team on **1300 650 873**.



\* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

## Step 1: Your personal details

Account number\*

Member number

Title

Date of birth\*

First name\*

Middle name

Last name\*

Home address\* (must not be a PO Box)

Suburb\*

State\*

Postcode\*

Mobile number\*

Daytime contact number

Email (Providing a personal email address rather than a work email address ensures we can contact you even if you change employers.)

By providing my email address I'm consenting to receive communications from Aware Super digitally as appropriate and in accordance with Aware Super's Privacy Policy. I understand I can change my communication preferences at any time by logging into Member Online or calling Aware Super on **1300 650 873**.

## Step 2: Declaration

- I authorise the Fund to act on my behalf for the purposes of giving the ATO Commissioner a written notice of my declaration that I am not a member of an inactive low-balance account with respect to the Fund.
- I understand that this election is valid for 16 months.
- I have read, understood and accept the Aware Super privacy policy.

Signature\*

Date signed\* (DD-MM-YYYY)



Please sign and date form here.



Post the form to this address.

## Step 3: Where to post your completed form

Please post the completed form to:

**Aware Super**  
**GPO Box 89**  
**MELBOURNE VIC 3001**

In case you need any further assistance, please contact our Member Support Team on **1300 650 873**.

## Important information

This form is valid for 16 months. If after that time your account continues to be an Inactive Low Balance Account, you will need to send us a new declaration, or take one of the following actions: receive a rollover or contribution, change investment options or insurance cover, or make a new or change your binding beneficiary nomination.

- Inactive Low Balance accounts are identified twice a year (in February and August). Once identified, we contact you to see what you would like us to do with your account.
- Your account will be transferred to the ATO if you don't return your declaration or do not take any of the following actions: receive a rollover or contribution, change in investment options, or insurance cover, or make a new or change your binding beneficiary nomination.
- The ATO will then transfer this amount to an active superannuation account in your name, if you have one.

## Definition of an Inactive Low Balance Account

- Has an account balance of under \$6,000.
- The account has no insurance attached to it.
- For a period of 16 months the account has not, received any rollovers or contributions, had a change in investment options, or insurance cover, or been subject to a new or changed binding beneficiary nomination.

## Aware Super privacy information

The personal information provided on this form is collected by and held for Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **[aware.com.au/privacy](https://aware.com.au/privacy)** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.