

# Proposed Superannuation Declaration Form

## Declarant Details

Name \_\_\_\_\_

Firm \_\_\_\_\_

Contact Number \_\_\_\_\_ Email \_\_\_\_\_

Role:  Accountant  
 Financial Planner / Adviser

I confirm I act as the Accountant / Financial Planner for:

SMSF Name

Member's Name

We have discussed the member's SMSF investment strategy and confirm they will be contributing an additional \$ \_\_\_\_\_ per:

Week  Fortnight  Month

as part of this strategy.

## Division 293 Tax Declaration

Is the member subject to Division 293 tax?

Yes  No

If Yes, please complete the following:

The member is aware they may be subject to additional tax payable due to their level of contributions or exceeding income thresholds.

I confirm in my discussions with the member that the additional tax will be paid by:

The member's own money  Releasing money from super

## Member's Name Acknowledgement & Signature

I \_\_\_\_\_ acknowledge the above declaration and confirm my understanding of the contribution strategy and any potential tax implications.

Signature \_\_\_\_\_ Date / /

## Declarant (Accountant/Financial Planner/Financial Advisor) Acknowledgement & Signature

I \_\_\_\_\_ confirm the above declaration and my role in advising the member regarding their proposed superannuation contributions.

Signature \_\_\_\_\_ Date / /