

Contribution deferring allocation service form



Complete and return to documentservices@heffron.com.au or mail to PO Box 200 Maitland NSW 2320.

SECTION A: ACCOUNTANT/ADVISER DETAILS

Contact person		Company name			
Postal address					
Suburb		State		Postcode	
Phone		Email			
Mobile phone		CC Email			
Please select how you would like to receive the documents		Email	OR	Post	

SECTION B: SMSF DETAILS

SMSF name	
ABN	

SECTION C: TRUSTEE STRUCTURE (Tick whichever is applicable)

Individual trustees	
Corporate trustee (Complete company name and ACN below)	
Company Name	ACN

SECTION D: DETAILS OF MEMBER(S), TRUSTEES/DIRECTOR(S) ETC (Tick whichever is applicable)

INDIVIDUAL 1	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title
INDIVIDUAL 2	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title
INDIVIDUAL 3	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title
INDIVIDUAL 4	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title
INDIVIDUAL 5	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title
INDIVIDUAL 6	Member	Individual Trustee	Director (Corporate trustee)
Full legal name (First/Middle/Last)			Title

Heffron Consulting Pty Ltd ABN 88 084 734 261 AFSL 241 739

Maitland: Unit 1, 27 Bulwer Street, Maitland NSW 2320 | Brisbane: Level 15, 120 Edward Street, Brisbane QLD 4000
Postal: PO Box 200, Maitland NSW 2320 | Call: 1300 HEFFRON | Fax: (02) 4930 2199 | Email: heffron@heffron.com.au

SECTION E: MEMBER DETAILS (Note: If we are documenting deferrals for more than one member, please copy this page.)

Full legal name (First/Middle/Last)				Title	
TFN ¹	Date of birth		Phone		
Postal address					
Suburb		State		Postcode	

¹ You do not have to provide your TFN to us, however it should be added to the ATO documentation prior to lodging as it will help them identify you correctly and process your form quickly.

SECTION F: CONTRIBUTION DETAILS (Note: If there is more than one contribution being deferred, please copy this page.)

Date contribution received by the Fund:		
Type of contribution	Amount	
Employer contribution	\$	
Personal contribution which member intends to claim as a tax deduction (a section 290-170 notice will need to be provided by the member and acknowledged by the trustee – this can't be done until the contribution is allocated to the member)	\$	
Personal contribution which member doesn't intend to claim as a tax deduction (ie a non-concessional contribution)	\$	
Other: (please advise type)	\$	
Date contribution is to be allocated to member account:		

SECTION G: ACKNOWLEDGEMENT

I confirm that the information on this form is correct and I have the authority to request and pay for the services requested on behalf of the superannuation fund.

I acknowledge and understand that unless a Statement of Advice from Heffron recommending the course of action contemplated by these documents has been obtained, Heffron has not reviewed my / our circumstances to determine whether or not such action is appropriate and have simply executed and provided the requested services in accordance with my / our instructions or instructions from my / our adviser(s).

Signature of person authorised to make the above statements on behalf of the member(s) and trustee(s) or director(s) of the corporate trustee

Print name

Date

SECTION H: PRIVACY STATEMENT

Heffron SMSF Solutions is committed to protecting the privacy and rights of its customers. Our [Privacy Policy](#) contains important information about how we collect, hold, use and disclose personal information. If you have questions or wish to make a complaint, please contact our Privacy Officer at Heffron Consulting Pty Ltd, PO Box 200, MAITLAND NSW 2320, or via email at privacy.officer@heffron.com.au.

SECTION I: PAYMENT INFORMATION

Amount:	\$
EFT Transfer	BSB: 082 691 Account: 561309446 <i>Please attach transaction receipt of payment to service form as confirmation of payment</i>
Credit Card – Please call Heffron on 1300-HEFFRON to process Credit card payments (VISA or Mastercard only)	
Direct Debit Authority in place	