

TAX File Number (TFN) Collection Statement



Providing your TAX file number to Crescent Wealth

Crescent Wealth is authorised to ask for your tax file number (TFN) in line with the Superannuation Industry (Supervision) Act 1993. Crescent Wealth will only use your TFN for lawful purposes. These purposes may change in the future if there are changes to the legislation.

Crescent Wealth may pass your TFN to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your TFN as part of this online application:

- Crescent Wealth will be able to complete a SuperMatch request to the Australian Taxation Office (ATO). This allows the ATO to undertake searches of information on the Lost Members Register, ATO held monies and superannuation entity held accounts that have been reported to the ATO. Search results are provided to Crescent Wealth for the purpose of creating an account for you in Crescent Wealth and consolidating your super into your account in Crescent Wealth.
- Crescent Wealth will use the ATO SuperTick service to verify your TFN, name and date of birth.
- Crescent Wealth will be able to accept all types of contributions made by or for you (some limits may apply).
- You can avoid paying tax at a higher rate than would otherwise apply on your super benefit.
- It will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

Choosing not to provide your TFN is not an offence. However, if you don't provide your TFN, you will be unable to proceed with this online application and you will need to complete a paper version of the application form if you wish to apply to join Crescent Wealth.

If you need help or require more information, please call the Helpline on 1300 926 626.

This document contains information which is general in nature and does not take into account your specific objectives, financial situation or needs. It is important that you consider the appropriateness of this information with regard to your financial objectives and personal situation. Before making any decisions in relation to the Crescent Wealth Superannuation Fund, you must read the Product Disclosure Statement at crescentwealth.com.au/super. The Crescent Wealth Superannuation Fund (ABN 71 302 958 449) is issued by the Trustee of the Fund, Equity Trustees Superannuation Limited (ABN 50 055 641 757). Crescent Wealth Funds Management (Aust) Ltd ("Crescent Wealth") ABN 32 144 560 172 AFSL 365260 is the Fund's promoter and is licensed to deal in the Fund.