



## Application to vary Tax Free amount

### Get the facts first

Before completing this form, please read the fact sheet *Concessions for Retirement Pay* available from the DFRDB website.

### Who should use this form?

Use this form if you are receiving DFRDB Retirement or Invalidity Pay and require a recalculation of your tax free amount to include your pre 1 July 1983 excess contributions.

### When to use this form?

Use this form if you have not previously advised the DFRDB of your pre 83 excess contributions. If you have previously advised the DFRDB of your pre 83 excess contributions, this amount has already been converted to a tax free amount.

### Definitions

**Pre 83 excess contributions:** Contributions made to the DFRDB prior to 1 July 1983 which, together with life insurance premiums (if any), exceeded an annual limit of \$1200. Records of these contributions are held by the Australian Taxation Office (ATO).

**Tax free Amount:** The tax free amount is based on your member contributions made after July 1983, together with any pre 83 excess contributions that you applied to your Retirement Pay. Please note you are not eligible for an increase in your tax free amount if you previously elected to receive your pre 83 excess contributions as part of a lump sum.

### Documentation from the Australian Taxation Office

As records of your pre 83 excess contributions are held by the ATO, you will need to;

Organise with the ATO to issue you with a current letter stating the value of your pre 83 excess contributions. You can request this letter from the ATO by phoning **131 020** or by writing to:

The Australian Taxation Office  
Superannuation Business Line  
PO Box 3100  
Penrith NSW 2740

If your pension commenced prior to 1 July 1983 you will instead need to ask for a letter stating your 'deductible amount'. Please note that the documentation issued by the ATO must be current.

Please forward this information to ComSuper. We will then recalculate your tax free amount and provide you with an amended payment summary for the 2007/08 financial year (and any subsequent financial years, if applicable), together with details of your new tax components.

If you are receiving a Reversionary Pension please obtain a letter directly from the ATO confirming the value of your late spouse's pre-July 1983 excess contributions.

## Privacy

The DFRDB and our administrator, ComSuper, are committed to protecting any information you give us. Your contact information will be used to confirm your identity and correspond with you about your tax free amount and your DFRDB retirement pay.

The DFRDB Authority and its administrator, ComSuper, are collecting the information on this form for the following reasons:

- to confirm your identity
- to assess your eligibility for payment/rollover of the benefit
- to pay your benefit or to roll it over
- to contact you

The DFRDB Authority and ComSuper are committed to protecting any personal information we hold about you. Your information will not be used for any other purpose or disclosed to another party unless:

- you authorise us to do so
- the disclosure is authorised by law. This may include disclosing your personal information to other Government agencies that have specific legislative authority to collect this information (for example the Australian Taxation Office, Centrelink or the Department of Veterans' Affairs). We will not disclose your personal information to these agencies unless it is lawful to do so

## Need more information?

Defence Force Retirement and Death Benefits (DFRDB) Scheme is administered by ComSuper. If you need more information or help to complete this application please:

<b>Visit</b> Unit 4 Cameron Offices Chandler Street Belconnen ACT 2617	<b>Mail</b> DFRDB PO Box 22 Belconnen 2616	<b>Email</b> pensions@dfldb.gov.au
<b>Phone</b> 1300 001 877 for the cost of a local call	<b>Fax</b> (02) 6272 9618	<b>Internet</b> www.dfrdb.gov.au

When contacting ComSuper, please remember to quote your reference number.



## Application to vary Tax Free amount

**PART A**  
**About yourself**

1. Title \_\_\_\_\_  
 Surname \_\_\_\_\_  
 Given names \_\_\_\_\_  
 .....

2. Reference number \_\_\_\_\_  
 .....

3. Date of birth \_\_\_\_\_  
   | | | |   | | | |   | | | |  
   day    month    year  
 .....

4. Postal address \_\_\_\_\_  
 \_\_\_\_\_  
 Residential address \_\_\_\_\_  
 \_\_\_\_\_  
 Email address \_\_\_\_\_  
 \_\_\_\_\_

**PART B**  
**ATO documentation**

**Please complete Part B**

*As records of your pre 83 excess contributions are held by the ATO, you will need to organise the ATO to issue you with a current letter stating the value of your pre 83 excess contributions.*

5. I have obtained pre 83 excess contribution documentation directly from the ATO and have attached a copy to this application form. I request that ComSuper recalculate my tax free amount based on the attached documentation.

Your signature \_\_\_\_\_  
 Date \_\_\_\_\_  
   | | | |   | | | |   | | | |  
   day    month    year

ATO documentation attached - Please go to Part C

**PART C**  
**Lodgement**

6. Send your completed application and attachments to:

DFRDB  
 PO Box 22  
 BELCONNEN ACT 2616