
Excess concessional contributions (EY)

Refund of Excess Concessional Contributions

Choice to include excess concessional contributions in assessable income

Tax File Number	^AAD		
Title	^ABE		
Surname or Family name	^ABF	Suffix	
Given names	^ABG	Other	^BBB

Complete this form to have your excess concessional contributions include in your assessable income and taxed at your marginal rate.

Complete this form and lodge it within 28 days of the issue date of the letter from the ATO and the ATO will give you a 15% credit for the tax paid by the super fund on your excess concessional contributions.

Excess concessional contributions amount as detailed on the Offer letter from the ATO	E117 ^JYE
Financial year in which the release amount will be included as assessable income	^JYF

SECTION A: Super Fund Details

Choose the option that applies to you.

Option 1: Accept the offer and withdraw refund amount from the fund nominated by the ATO. I acknowledge that the ATO will ask the super fund nominated below to release 85% of my excess concessional contributions from my account. ^JYG

Super fund name	^ARC E192	
	Australian business number	^EBN E185
	Member account number	^BSD E186
	Member identifier number	^BSE E187

Option 2: Accept the offer and nominate a different fund to withdraw the refund amount. ^JYH

	Reason:	^JYI E405
Super fund name	^JYJ E494	
	Australian business number	^JYK E495
	Member account number	^JYL E496
	Member identifier number	^JYM E497

Option 3: Accept the offer where no valid accumulation fund exists.

I declare that I no longer hold an accumulation fund in any super fund.

I understand the ATO will amend my income tax assessment and send a **Notice of amended assessment** and **Statement of account** showing the amount of tax payable (if any) which cannot be paid from my super fund.

I understand that I am responsible for the payment of this amount. ^JYN

Does the nominated super fund hold your tax file number (TFN)?
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^JYO E105

If you have chosen not to provide your TFN to your super fund we may not be able to correctly match and process your excess concessional contributions from the nominated super fund. Significant consequences apply for members who choose not to provide their TFN to their super fund. For example, additional tax applies for some contributions and others cannot be accepted.

SECTION B: Declaration

I, the legal representative, declare that:

* I am authorised by the client to give this application to the ATO

* this application and attached documents have been prepared according to the information supplied by the client

* I have received a declaration from the client on this application, stating that the information provided and any attached documents are true and correct.

Name	Area code	Telephone number	Agent's reference number

Signature

Date
