



Application to have pre-July 1983 excess contributions included in tax-free amount

1. Explanatory notes
2. Form

Important information about this form

Before you start

Please read the **Tax and your PSS pension** factsheet which is available at pss.gov.au

Who should use this form?

You should use this form if you are receiving a PSS pension and need a recalculation of your tax-free amount which includes your pre-July 1983 excess contributions.

When to use this form

You will need to use this form if you have not already told us about your pre-July 1983 excess contributions. If you have already let us know about your pre-July 1983 excess contributions, we have already converted this amount to a tax-free amount.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this ☐ with a ✓ or ✗ then fill out the next question or section.

Submitting your form

Please post your completed, signed application form and attached documents to:

PSS
GPO Box 2252
Canberra ACT 2601
AUSTRALIA

Financial advice for your needs and goals

Obtaining professional advice from an experienced financial planner can help you reach your financial goals.

CSC's authorised financial planners provide 'fee for service' advice, which means you receive a fixed quote upfront. There are no obligations, commissions or hidden fees.

To arrange an initial advice appointment please call 1300 277 777 during business hours.



Public Sector
Superannuation
Scheme

1. Explanatory notes start

Definitions

Pre-July 1983 excess contributions

Contributions made to PSS before 1 July 1983 which, together with life insurance premiums (if any), exceeded an annual limit of \$1,200. The Australian Taxation Office (ATO) holds pre-July 1983 excess records.

Tax-free amount

The tax-free amount is based on the member contributions you made after July 1983, together with any pre-July 1983 excess contributions that you applied to your pension. Please note you are not eligible for an increase in your tax-free amount if you have already elected to receive your pre-July 1983 excess contributions as part of a lump sum instead of a pension. In addition, you must have started receiving your pension before 1 July 1994.

Documents from the Australian Tax Office

As records of your pre-July 1983 excess contributions are held by the ATO, you will need to ask the ATO to issue you with a current letter stating the value of these excess contributions.

You can request this letter from the ATO by calling **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 PSS. 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

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice (available via pss.gov.au or by contacting us on **1300 000 377**) for the purpose of managing your super.

This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development.

The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.

Where can I get more information?

Phone: **1300 001 777**
Fax: 02 6275 7010
Post: PSS
GPO Box 2252
Canberra ACT 2601
Email: pensions@pss.gov.au
Web: pss.gov.au

End of
explanatory
notes



Application to have pre-July 1983 excess contributions included in tax-free amount

2. Form start

Read the Explanatory notes and each section of the form carefully before filling it in.

A Eligibility

1. Did you start receiving your pension (or if you are receiving a reversionary pension, your spouse's pension) before 1 July 1994?

☐ Yes—go to **question 2**

☐ No—you are not eligible to have your pre-July 1983 excess contributions included in your tax-free amount. Please see the **Explanatory notes** for more information on eligibility.
2. On exit from PSS did you choose to receive your pre-July 1983 excess contributions as part of your lump sum?

☐ Yes—you are not eligible to have your pre-July 1983 excess contributions included in your tax-free amount. Please see the **Explanatory notes** for more information on eligibility.

☐ No—go to **Section B**

B Personal details

Personal details

Reference number (AGS)

[illegible]

Salutation

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Surname

[illegible]

Given name(s)

[illegible][illegible]

Date of birth

D	D		M	M		Y	Y	Y	Y
		/			/				



Public Sector Superannuation Scheme

 Section B continued on next page

Email address

RESIDENTIAL ADDRESS																			
SUBURB										STATE					POST CODE				
POSTAL ADDRESS																			
SUBURB										STATE					POST CODE				
BUSINESS HOURS																			
AFTER HOURS																			
MOBILE NUMBER																			