



Application to vary tax-free amount

Important information about this form

Get the facts first

Before completing this form, please read the **Retirement benefits** factsheet available from the DFRDB website dfrdb.gov.au

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 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 DFRDB prior to 1 July 1983 which, together with life insurance premiums (if any), exceeded an annual limit of \$1,200. 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:

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



**Defence Force
Retirement & Death
Benefits Scheme**

➡ About this form continued on next page

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 DFRDB. 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.

Need more information?

If you have any further questions about your benefit entitlements or investment options you can contact us in the following ways:

Mail

GPO Box 2252
Canberra ACT 2601

Internet

csc.gov.au

Phone

1300 001 677
for the cost of a local call

Email

members@dfldb.gov.au

Fax

(02) 6272 9616

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

Mail completed application form and cheque or money order to:

DFRDB

GPO Box 2252
Canberra ACT 2601
Australia



Application to vary
tax-free amount

Form start

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

A

About yourself

1.

Title

☐ Mr

☐ Mrs

☐ Ms

☐ Miss

☐ Other

Surname

Given name(s)

2.

Reference number

3.

Date of birth

D

D

M

M

Y

Y

Y

Y

/

/

4.

Postal address

SUBURB

STATE

POSTCODE

Residential address

SUBURB

STATE

POSTCODE

Email address

@



Defence Force
Retirement & Death
Benefits Scheme

B ATO documentation

As records of your pre 83 excess contributions are held by the ATO, you will need to arrange for 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 DFRDB recalculate my tax-free amount based on the attached documentation.



SIGNATURE	

Date signed

D	D	/	M	M	/	Y	Y	Y	Y

ATO documentation attached ☐

F Lodgement

You have now completed this form.

6. Send your completed application and attachments to:

DFRDB
GPO Box 2252
Canberra ACT 2601
Australia

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 [dfrdb.gov.au](https://www.dfrdb.gov.au), or by contacting DFRDB on **1300 001 677**, 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.

End Form



Need assistance?
Call us on the phone
numbers below



Email
members@dfrdb.gov.au



Phone
1300 001 677



Fax
(02) 6275 7010



Post
DFRDB
GPO Box 2252
Canberra ACT 2601



Web
[csc.gov.au](https://www.csc.gov.au)



Overseas Callers
+61 2 6275 7000