

Notification of Tax File Number

The collection, use and disclosure of your Tax File Number is authorised and regulated by the Privacy Act. Other specific personal information is also being collected from you when you complete this form.

Please note that the provision of a Tax File Number is voluntary. If you choose not to provide your Tax File Number, withholding tax may be deducted from interest you receive.

If you wish to access your personal information, please contact the Credit Union by one of the methods below.

Membership Number

Account type

- Account or investments in one name only (adult or child)
- Joint account (adults or children)
- Account for company/partnership/trust
- Account for unincorporated body (eg social clubs)

Name/s in which account is held (in full)

A)

B)

Two Tax File Numbers/Exemptions are required for a joint account, irrespective of the number of account holders.

Tax File Number/s (TFN)

Person/s

A)

B)

Company/Trust/Partnership (ABN or TFN)

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Signature/s

A)

B)

Exemption (please tick)

- PENSIONER
Age pension Widow's pension
Invalid pension Sole parent's pension
Service pension Special benefits
Wife's pension Rehab' allowance
Carer's pension
- NOT REQUIRED TO LODGE A TAX RETURN
(may not apply to non-profit organisations eg social clubs, sporting clubs. Check with your local Taxation Office if in doubt)
- OVERSEAS RESIDENT
Holidays - person must be in Australia for less than 6 weeks in the past 12 months. This exemption expires after 6 weeks.
Non-resident - person whose primary residence is overseas and therefore will pay/is paying non-resident withholding tax.
- ATO DIRECTIVE
Written exemption from the Australian Taxation Office (copy required).

Date

EECU Limited

ABN 35 087 650 039 AFSL 244356

T (Inc Telelink) 1300 65 3328 (Int'l + 61 3 9270 3328)

W (Inc Netlink) www.eecu.com.au

EECU FS25 (13/04/10)

Melbourne Office

12 Riverside Quay, Southbank Vic 3006

F +61 3 9270 3993

E melbourne@eeecu.com.au

P GPO Box 400, Melbourne Vic 3001

Sale Office

113 Cunninghame Street, Sale Vic 3850

F +61 3 5143 2716

E sale@eeecu.com.au

P 113 Cunninghame Street, Sale Vic 3850