

1 May 2023

# Inactive low-balance account declaration

**Complete this form if you have an inactive low-balance account and want this account to remain with us.**

- An inactive low-balance account must be transferred to the ATO in line with the Superannuation (Unclaimed Money and Lost Members) Act 1999. If your account is paid to the ATO, they will then try to transfer your money to your active super fund, if they can locate one for you, and if the transfer will take your total balance to \$6,000 or more.
- If the ATO are unable to transfer your super to an active account, your money will be kept with the ATO and you won't pay fees. When you claim your unclaimed super, any interest due is calculated using the consumer price index and will be included in the total amount being transferred.
- Your declaration will mean that your account will not be transferred to the Australian Taxation Office (ATO).
- Your declaration is valid for 16 months and is not enduring. This means that if your account meets the definition of an inactive low-balance account in the future, and you do not want this account transferred to the ATO, you will need to complete a new declaration.

\* Indicates a mandatory field.

## Your details

Fund name\*

Member number\*

Title (Dr/Mr/Mrs/Ms/Miss)\*  Surname\*

Given name(s)\*

## Current residential address (no PO box)

Address\*

Suburb\*  State\*  Postcode\*

Contact phone number\*

Email

## Member declaration

I declare that I am not a member of an inactive low-balance account and I do not want my account transferred to the ATO. I understand that this declaration is only valid for 16 months.

Name

Signature

Date  /  /

**Please forward all correspondence and enquiries to**

**Post:** GPO Box 264, Melbourne VIC 3001  
**Email:** [portfolioservice@sfg.com.au](mailto:portfolioservice@sfg.com.au)  
**Telephone:** 1800 931 792

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**Web:** [portfolio.sfg.com.au](http://portfolio.sfg.com.au)