HOW TO ACCESS YOUR SUPERANNUATION INFORMATION ON MYGOV

Our Independence. Maximises Yours.

Accessing your myGov account to retrieve your superannuation details helps us confirm the exact funds, contribution types and amounts recorded by the ATO - information that is essential for accurate tax planning, validating contribution histories, identifying gaps or duplicates, and ensuring any strategies we recommend are appropriate for your situation. The steps below will guide you through the necessary actions to provide us with the information we need.

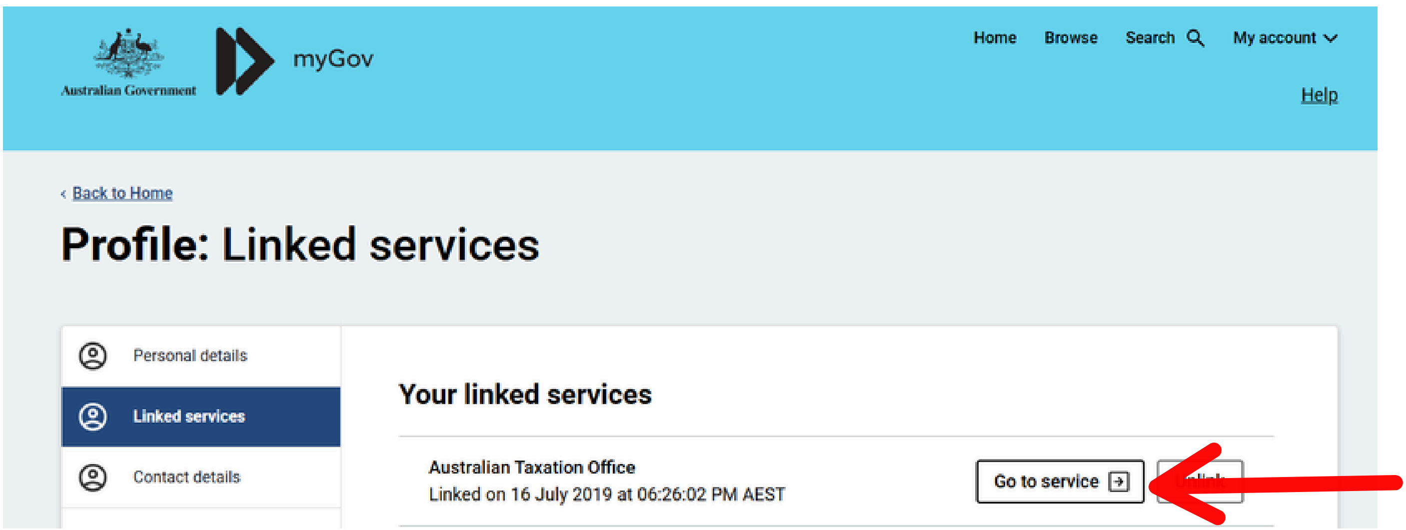
To get started, you'll need an active myGov account to have linked the Australian Taxation Office (ATO) service to your myGov record. **To do this, follow the steps below.**

ACCESS MYGOV

1. Create a myGov account: Agree to the terms and conditions, enter your email address, and follow the prompts to create an account.
2. Link the ATO with myGov: Select the SERVICES tab on the myGov home page, link the ATO, and answer questions relevant to your tax record.
3. To download your superannuation history from the ATO, follow these steps.

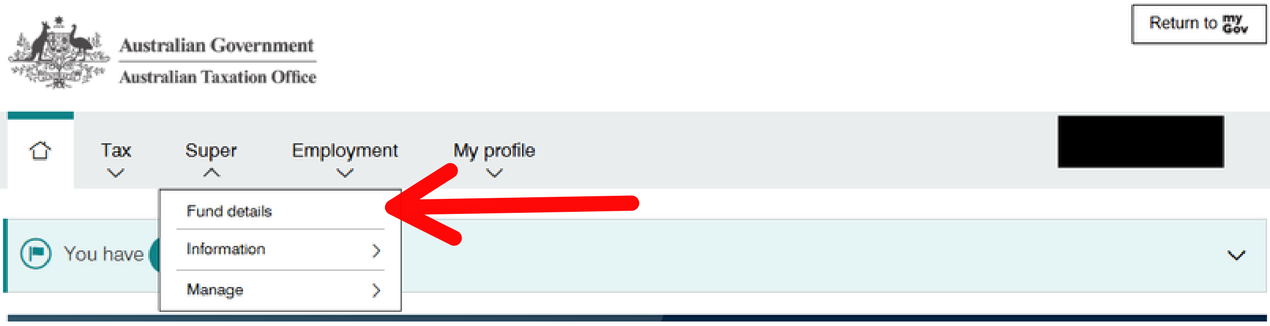
If you have a myGov account, follow the steps below to obtain your superannuation information.

Log in to your ATO online services via the Go to service → tab through myGov to view your superannuation details.



Download Your Super Fund Details

Navigate to the **Fund details** section to download your super fund information securely. You can download a statement for each of your superannuation funds.

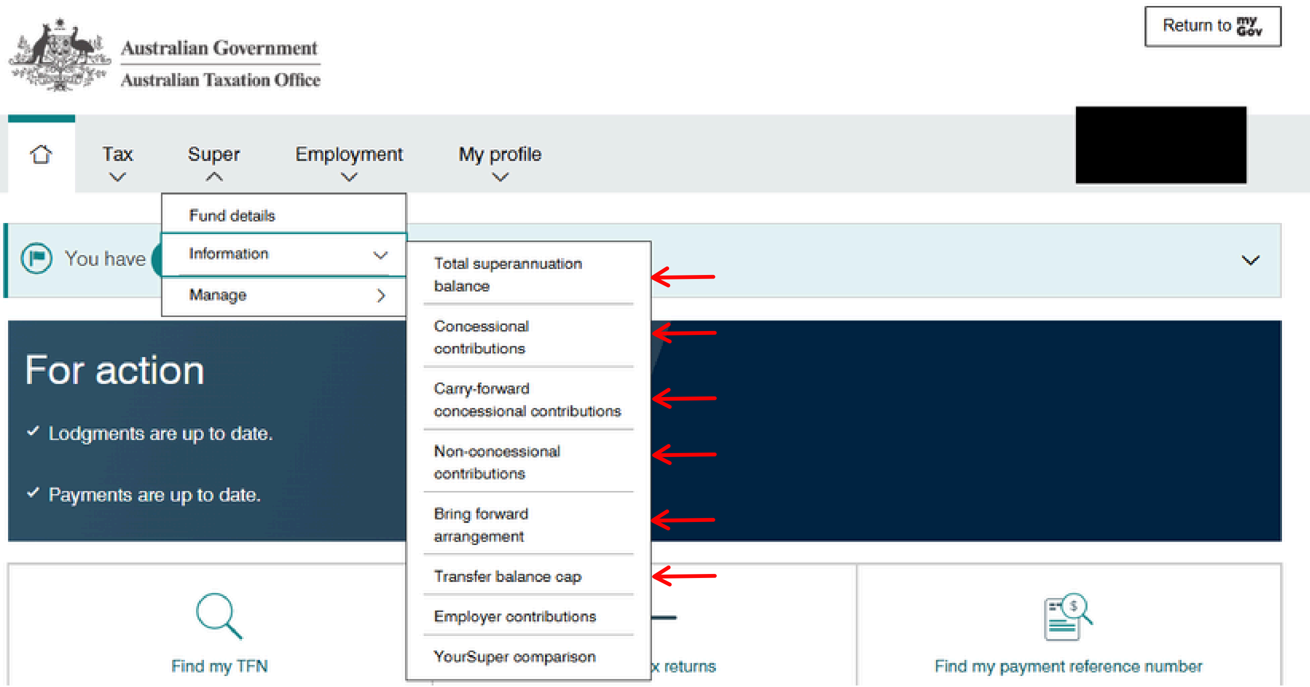


Superannuation Contributions - History

Please follow the next steps to view the types of superannuation contributions you have - this information affects the tax strategies we may recommend. There is no direct download option on these screens, so please take a screenshot of the contribution details and email it to us.

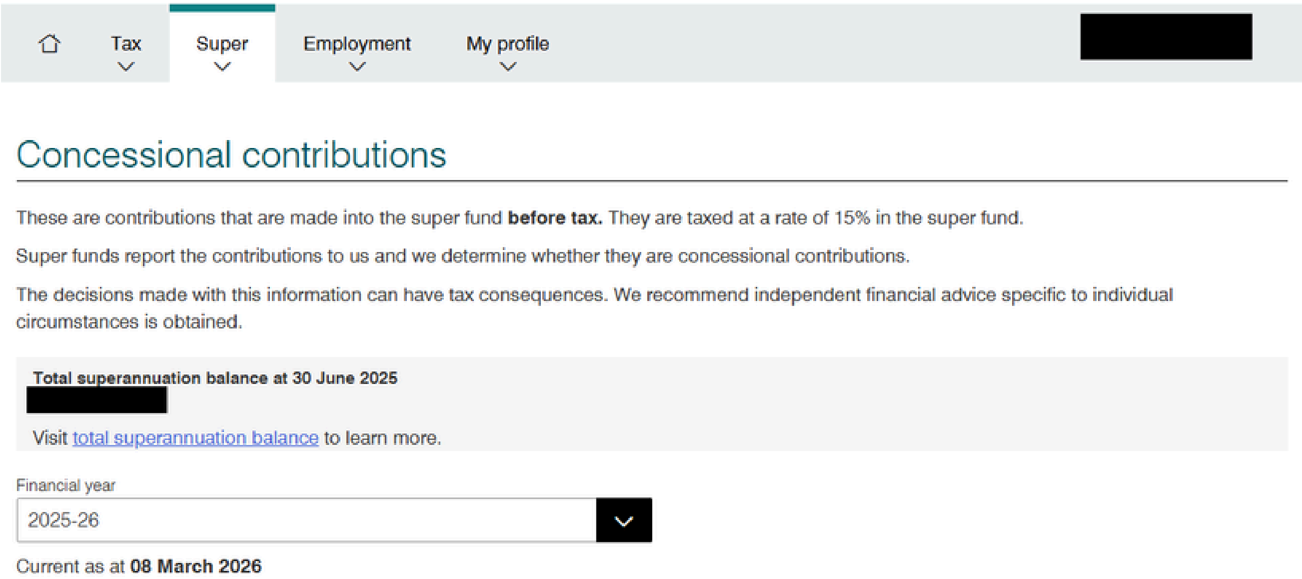
Please view each of the:

- Total superannuation balance
- Concessional contributions
- Carry-forward concessional contributions
- Non-concessional contributions
- Bring forward arrangement
- Transfer balance cap



Superannuation Contributions - Ct'd

As an example, the concessional contribution screen will look like the one below.
Choose the financial year(s) you want to view to capture the relevant information for the current and previous years.



Confirm and Send To Us

1. Review the downloaded file or screenshots to ensure the financial year and contribution types are visible.
2. If using email, please password-protect the files and sending the password in a separate message or phone call.
3. If you prefer, call our office and we can arrange a secure upload link or help you during a scheduled screen-share.

Check For Lost Super

NOTE: Use the 'Find lost super' open to search for any lost or unclaimed super linked to your account.

If you would prefer to discuss any of the above with a Hewison Private Wealth team member, please contact us on 03 8548 4800.

HEWISON PRIVATE WEALTH

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