# Salary Packaging – changing providers (transitioning)

**To:** [Employee Name]

There are [number] providers of salary packaging administration services for [Name of Public Authority]. These are:

|  |  |
| --- | --- |
| [Name of Contractor][Web Site address www…] Phone: (08) xxxx xxxx Email: contractor@customersvc.com.au  | [Name of Contractor][Web Site address www…] Phone: (08) xxxx xxxx Email: contractor@customersvc.com.au  |

**The [Name of Public Authority] Salary Packaging Policy allows employees to change (transition between) providers at the beginning of each Fringe Benefits Tax year – i.e. [1st April] or as determined by the [Name of Public Authority].**

There is a requirement to transition, as the [existing CUA/Contract] will expire on the [30th April 2017/Date]. The available Contractors are listed above. The process to follow is to contact your new provider direct by telephone or email, who will arrange for your salary packaging details to be transferred from your current provider.

We recommend that at the same time you contact your current provider by telephone or email to:-

* Advise them of your decision;
* Instruct them to cease making payments as at the last pay day in [Day, Month, Year] and to reconcile your account as at that date;
* Provide them with your instructions as to any excess or negative fund balances remaining in your account; and
* Should you have a novated lease, inform them of all the required details so they are able to complete end of year FBT processes.

If you have a financial adviser, we also recommend that you inform them before contacting your new provider to ensure they are aware of your intent.

The window for transitioning is from now until [Day, Month, Year]. This timeframe is set to allow sufficient time for packaging arrangements to be finalised with your new provider. No requests to transition will be processed after [Day, Month, Year]. Unless you advise the undersigned of any objections within the next [X] days, [Name of Public Authority] will direct your current provider to transfer your personal details held on their records to the successor Contractor.

Your new provider will commence handling your salary packaging arrangements from the first pay period in [Day, Month, Year].

**If you have any questions about transitioning, please contact your local Salary Packaging Coordinator.**

Signed:

**Position Title:**

**Name of Public Authority:**