

# Contribution Splitting Form

ALL SECTIONS MUST BE COMPLETED

PLEASE ☒ NOT ☒

PLEASE USE BLOCK LETTERS



This form should be used if you want to split eligible concessional contributions with your spouse. **If your spouse is not already a Club Super member, they will need to complete the Member Application Form in the Product Disclosure Statement prior to completing this form (this is not required if contributions are being split to an external Fund).**

Section A is to be completed by the contributing spouse (the person splitting the contributions to their spouse), while section B is to be completed by the receiving spouse (the person receiving the split contributions).

## ARE YOU A MEMBER OF CLUB SUPER?

☐ YES ☐ NO If YES, Member No:

**Note: if you have changed your name since first becoming a member please attach a certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.**

## IMPORTANT INFORMATION

### What is contributions splitting?

Contribution splitting allows members to split up to 85% of their eligible concessional (before-tax) contributions for either the current or prior financial year, with their spouse. Eligible concessional contributions are contributions that have had 15% contributions tax deducted when Club Super receives them.

### What contributions can be split?

Concessional contributions that can be split include:

- Employer contributions
- Salary sacrificed contributions
- Personal contributions where a tax deduction has been claimed for.

In most cases, only concessional contributions made in the previous financial year can be split. However, if you are rolling over or transferring your entire Club Super benefit during the current financial year, you may also be able to split your current financial year concessional contributions. Applications to split contributions must be lodged by 30 June in the year following the financial year in which the contributions were made.

### What are the rules for a spouse?

The definition of a spouse includes:

- \* a person you are legally married to
- \* a person you are in a relationship with that is registered under certain or territory laws (including registered same-sex relationships)
- \* a person, of the same or of a different sex, who lives with you on a genuine domestic basis in a relationship as a couple (known as a 'de-facto spouse').

To split your contributions with your spouse they must be aged less than their preservation age, or between their preservation age and 65 years of age, and not retired. If they have reached their preservation age and are younger than 60, they are considered to be permanently retired from the workforce if their employment arrangement has come to an end, and they do not intend to work full-time or part-time again.

More information about preservation ages and when you can access your superannuation benefits can be found in *Additional Information – Claiming a benefit* which can be downloaded from our website

[www.clubsuper.com.au/members/publications/](http://www.clubsuper.com.au/members/publications/)

### Tax File Number (TFN)

**This does not need to be provided if you have previously given your TFN to Club Super or if contributions are being split to an external Fund.**

You are not obligated to provide your TFN to your superannuation fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate plus the Medicare levy on the above mentioned concessional contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account. If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future. Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee. Need help with contribution splitting? Contact us to discuss the financial advice options available to you.

## SECTION A: CONTRIBUTING SPOUSE (the person splitting their contributions to their spouse)

### PERSONAL DETAILS

DATE OF BIRTH  /  /  GENDER ☐ MALE ☐ FEMALE

TITLE ☐ MR ☐ MRS ☐ MS ☐ DR SPECIFY IF OTHER

FIRST NAME

MIDDLE NAME

FAMILY NAME

### RESIDENTIAL ADDRESS

STREET NUMBER  STREET NAME

SUBURB/TOWN

STATE  POSTCODE

### POSTAL ADDRESS (If same as above, write "as above")

PO BOX  SUBURB/TOWN

STATE  POSTCODE

### PROOF OF IDENTITY

We are required by law to obtain proof of your identity before paying any benefit. You may elect for

1. Electronic based identity verification or;
2. Document based identity verification.

Please confirm which option you would prefer.

☐ 1. Electronic

We will use a credit reporting agency to verify your details across a range of data sources. This will only be used to verify your identity under current legislation, and is not a credit check. If we are unsuccessful in electronically verifying your identity, we may request you to provide document based proof of your identity. We may be unable to verify you electronically if your name has recently changed or you are currently living overseas.

Please provide either your Passport **or** your Driver's Licence number if you would like us to verify you electronically. We will be in touch if we have any issues verifying you.

# Contribution Splitting Form



## IDENTIFICATION REQUIREMENTS

PASSPORT NUMBER

COUNTRY OF BIRTH

DRIVER'S LICENCE NUMBER

STATE OF ISSUE

☐ 2. Document Based

Please post your certified ID documentation. For the full details of identification requirements and the list of people who can certify your documents, refer to Additional Information - Claiming a Benefit, available at [www.clubsuper.com.au/members/publications/](http://www.clubsuper.com.au/members/publications/). This is important information and you should read this before making a decision.

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

The following documents may be used:

### EITHER:

One of the following certified documents only:

- Driver's licence issued under State or Territory law (current and must not have expired)
- Passport (must be current, however we can still accept if it has expired within the last 2 years)
- 18+ Card (must be current)

### OR:

Two of the following documents (one from each column)

#### One of the following documents:

- Birth certificate or birth extract, or
- Citizenship certificate issued by the Commonwealth, or
- Concession card issued by The Department of Human Services (DHS) that entitles the person to financial benefits.

AND

#### One of the following documents:

Notice that contains your name & residential address that was issued by:

- Commonwealth, State or Territory Government within the past 12 months that records the provision of a financial benefit, for example: Letter from the DHS regarding a Government assistance payment, or
- Australian Taxation Office within the past 12 months that records a debt or refund payable, for example: Tax Office notice of Assessment, or
- Notice issued by Local Council or Utilities Provider within the past 3 months that records the provision of services for example: Rates Notice, Electricity or Phone Bill.

## TAX FILE NUMBER (TFN)

(not required if contributions are being split to an external Fund)

I have read the information concerning Tax File Numbers (TFN) and understand a failure to provide my TFN will result in tax implications on my Concessional Contributions and the inability of the Fund to receive any Non-Concessional Contributions. I further understand the Fund will only use my TFN for the approved purposes.

## TAX FILE NUMBER (TFN) *continued*

MY TAX FILE NUMBER IS

   -    -   

## FINDING OTHER SUPER

The ATO offers a SuperMatch facility, which allows Club Super to use your TFN to search for any superannuation you may have in other Funds, or held by the ATO. However, Club Super requires your consent to use your TFN for this purpose.

☐

I consent to allow Club Super to

- use my TFN to search the Australian Taxation Office's (ATO) SuperMatch service for any super I may have;
- transfer any super-related monies held by the ATO to my Club Super account and to notify me; and
- advise me of any other super found and give me the opportunity to transfer it into my Club Super account.

This consent is ongoing until I revoke it with the Fund in writing or by calling 1300 369 330. For further information on the collection and use of TFNs please refer to *Additional Information - How super is taxed* available at [www.clubsuper.com.au/members/publications/](http://www.clubsuper.com.au/members/publications/)

SIGNATURE

NAME (PRINT IN BLOCK LETTERS)

DATE

 /  / 

## PLEASE COMPLETE ONE OF THE FOLLOWING OPTIONS:

1. Please complete this section if your spouse has an existing account in Club Super and you would like your split contributions to go into your spouse's account.

SPOUSE ACCOUNT NUMBER

2. Please complete this section if you would like to have your contributions sent to your spouse's account in a Fund other than Club Super.

FUND NAME AND ADDRESS

  

ABN NUMBER

MEMBER ACCOUNT NUMBER

SUPERANNUATION PRODUCT IDENTIFICATION NUMBER (SPIN)

UNIQUE SUPERANNUATION IDENTIFIER (USI) OF OTHER FUND (IF KNOWN)

## PLEASE COMPLETE DETAILS ON THE NEXT PAGE

# Contribution Splitting Form



## RELEVANT YEAR AND AMOUNT TO BE SPLIT

☐ Previous financial year - 30 June

☐ Current financial year - 30 June

(only available if you are rolling over your entire benefit this year and closing your Club Super account)

## CONCESSIONAL (TAXED) SPLITTABLE CONTRIBUTIONS TO BE SPLIT TO SPOUSE'S ACCOUNT

DOLLAR AMOUNT  or PERCENTAGE

**Please note:** If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the Trustee notice of your intention to claim a deduction before you lodge a superannuation splitting application. A copy of the *Personal Super Contributions Tax Deduction* form is available on [clubsuper.com.au/members/forms](http://clubsuper.com.au/members/forms)

The contributions you elect to split will be drawn proportionately from your current investment option profile.

## CONTRIBUTING SPOUSE REQUEST AND DECLARATION

I request that you split the contributions detailed in the "Relevant year and amount to be split" section to the superannuation account of my spouse as detailed in section B. I declare that the information provided on this form is true and correct.

SIGNATURE

NAME (PRINT IN BLOCK LETTERS)

DATE

### Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy visit [clubsuper.com.au](http://clubsuper.com.au) or call us on 1300 369 330 for a copy of the Privacy Policy.

## SECTION B: RECEIVING SPOUSE (the person receiving the split contributions)

### PERSONAL DETAILS

DATE OF BIRTH

GENDER

☐

MALE

☐

FEMALE

TITLE

☐

MR

☐

MRS

☐

MS

☐

DR

SPECIFY IF OTHER

FIRST NAME

MIDDLE NAME

FAMILY NAME

## PERSONAL DETAILS *continued*

### RESIDENTIAL ADDRESS

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

POSTCODE

### POSTAL ADDRESS (If same as above, write "as above")

PO BOX

SUBURB/TOWN

STATE

POSTCODE

## IDENTIFICATION REQUIREMENTS

We are required by law to obtain proof of your identity before paying any benefit. You may elect for

1. Electronic based identity verification or;
2. Document based identity verification.

**Please confirm which option you would prefer.**

☐

1. Electronic

We will use a credit reporting agency to verify your details across a range of data sources. This will only be used to verify your identity under current legislation, and is not a credit check. If we are unsuccessful in electronically verifying your identity, we may request you to provide document based proof of your identity. We may be unable to verify you electronically if your name has recently changed or you are currently living overseas.

Please provide either your Passport **or** your Driver's Licence number if you would like us to verify you electronically. We will be in touch with any issues verifying you.

PASSPORT NUMBER

COUNTRY OF BIRTH

DRIVER'S LICENCE NUMBER

STATE OF ISSUE

☐

2. Document Based

Please post your certified ID documentation. For the full details of identification requirements and the list of people who can certify your documents, refer to Additional Information - Claiming a Benefit, available at [www.clubsuper.com.au/members/publications/](http://www.clubsuper.com.au/members/publications/). This is important information and you should read this before making a decision.

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

PLEASE COMPLETE DETAILS ON THE NEXT PAGE

# Contribution Splitting Form



## IDENTIFICATION REQUIREMENTS *continued*

The following documents may be used:

### EITHER:

**One** of the following certified documents only:

- Driver's licence issued under State or Territory law (current and must not have expired)
- Passport (must be current, however we can still accept if it has expired within the last 2 years)
- 18+ Card (must be current)

### OR:

Two of the following documents (one from each column)

### One of the following documents:

- Birth certificate or birth extract, or
- Citizenship certificate issued by the Commonwealth, or
- Concession card issued by The Department of Human Services (DHS) that entitles the person to financial benefits.

### AND

### One of the following documents:

Notice that contains your name & residential address that was issued by:

- Commonwealth, State or Territory Government within the past 12 months that records the provision of a financial benefit, for example: Letter from the DHS regarding a Government assistance payment, or
- Australian Taxation Office within the past 12 months that records a debt or refund payable, for example: Tax Office notice of Assessment, or
- Notice issued by Local Council or Utilities Provider within the past 3 months that records the provision of services for example: Rates Notice, Electricity or Phone Bill.

## TAX FILE NUMBER (TFN)

(not required if contributions are being split to an external Fund)

I have read the information concerning Tax File Numbers (TFN) and understand a failure to provide my TFN will result in tax implications on my Concessional Contributions and the inability of the Fund to receive any Non-Concessional Contributions. I further understand the Fund will only use my TFN for the approved purposes.

MY TAX FILE NUMBER IS

□ □ □ — □ □ □ — □ □ □ □

## FINDING OTHER SUPER

The ATO offers a Super Match facility, which allows Club Super to use your TFN to search for any superannuation you may have in other Funds, or held by the ATO. However, Club Super requires your consent to use your TFN for this purpose.

☐

I consent to allow Club Super to

- use my TFN to search the Australian Taxation Office's (ATO) SuperMatch service for any super I may have;
- transfer any super-related monies held by the ATO to my Club Super account and to notify me; and
- advise me of any other super found and give me the opportunity to transfer it into my Club Super account.

This consent is ongoing until I revoke it with the Fund in writing or by calling 1300 369 330. For further information on the collection and use of TFNs please refer to *Additional Information - How super is taxed* available at [clubsuper.com.au](http://clubsuper.com.au)

SIGNATURE

NAME (PRINT IN BLOCK LETTERS)

DATE

## RECEIVING SPOUSE DECLARATION

I declare that at the date of this application I am the spouse of the applicant and I am aged:

- less than 65, OR
- between my preservation age and 65 years and have not retired from the work force or left employment after turning 60.

SIGNATURE

NAME (PRINT IN BLOCK LETTERS)

DATE

## Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy visit [clubsuper.com.au](http://clubsuper.com.au) or call us on 1300 369 330 for a copy of the Privacy Policy.

## GENERAL ADVICE WARNING

This information is of a general nature only. It does not take into account your individual financial situation, objectives or needs. You should consider your own financial position and requirements before making a decision. You may like to consult a licensed financial adviser in order to assist you with this. You should also refer to member and/or employer handbooks (Product Disclosure Statements) and our Financial Services Guide (FSG) before making a decision.

Club Plus Qld. Pty. Ltd. (ABN 30 010 892 396), the Trustee of Club Super (ABN 12 737 334 298) is Corporate authorised representative No. 268814 under Australian Financial Services Licence No. 238507 and is authorised to provide general financial product advice.

**Please note:** The Trustee does not guarantee the investment performance or return of capital invested in this Fund. Past performance is not a reliable indication of future performance.

A copy of the Club Super Product Disclosure Statement and Club Super Financial Services Guide is available on our website or alternatively, please call 1300 369 330 to have a copy of these documents posted to you.

## Contact details for Club Super

**Postal address:** PO Box 10726  
Brisbane Adelaide Street QLD 4000  
**Phone:** 1300 369 330  
**Email:** [info@clubsuper.com.au](mailto:info@clubsuper.com.au)  
**Business address:** Level 2 - West Tower  
410 Ann Street Brisbane QLD 4000  
**Fax:** (07) 3236 0555  
**Website:** [clubsuper.com.au](http://clubsuper.com.au)

**PLEASE ENSURE YOU HAVE COMPLETED ALL RELEVANT SECTIONS OF THIS FORM.**

**RETURN COMPLETED FORM TO: CLUB SUPER PO BOX 10726 BRISBANE ADELAIDE STREET QLD 4000**