

Contributions splitting application

Return this completed form to:

Use this form to transfer contributions made to your legalsuper account into your spouse's super. You are required to satisfy the 'ID Requirements' set out over the page, so that we are able to verify your identity.

legalsuper
Locked Bag 5081
Parramatta NSW 2124
Phone: 1800 060 312

Please use **BLOCK letters and black ink** when completing this form.

Fees

A \$50 Contribution splitting fee will be deducted from your account if the receiving spouse is not a legalsuper member.

1. Your details

legalsuper Membership Number

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone Number

Mobile Number

Email

2. Receiving spouse details

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone Number

Mobile Number

Email

3. Receiving spouse fund details

Is your spouse a legalsuper member?

If yes, your spouse's legalsuper membership number

If no, and your spouse would like to be a member of legalsuper, call the Customer Service Team on **1800 060 312** (8am to 8pm [AEST] Monday to Friday) for a *Membership application* form. Your spouse must have a superannuation account in place before you lodge this *Contributions splitting application*.

OR

Receiving spouse's fund (other than legalsuper)

Name of fund

Policy/member number

The Fund's Australian Business Number (ABN)

The Fund's Superannuation Fund Number (SFN)

The Fund's Unique Superannuation Identifier (USI)

Postal Address

Town or Suburb

State Postcode

4. Contribution splitting details

Financial year ended (dd/mm/yyyy)

3 0 0 6 2 0

Taxed contributions to be split

\$

Please tick this box if you want to split 85% of your taxed contributions.

e.g. employer and salary sacrifice contributions, and certain member contributions (see Note below). You can split up to 85% of these contributions but not more than your concessional contributions cap for the financial year.

Your remaining account balance after the split (including fees) must have a minimum balance of \$5,000.

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 this *Contributions splitting application*.

You can only split contributions which were made to your account on or after the beginning of the last financial year and are in your account as at the claim calculation date (i.e. end of financial year above). Any contributions received into your account and then transferred to another account, including within the Fund, cannot be split.

5. Declaration

Your request and declaration

- I request that you split the contributions shown in Section 4: 'Contributions splitting details', to my spouse's superannuation account as shown in Section 3: 'Receiving spouse fund details'.
- I understand that I must maintain a minimum balance of \$5,000 in my legalsuper account.
- I understand that all split contributions to my spouse's account will be preserved.
- I declare that the information provided on this form is correct.

Your signature

Date (dd/mm/yyyy)

Your spouse's declaration

- I declare that at the date of this application I am the spouse (married or de facto of the same or opposite sex) of the person making this application.
- I declare that I am aged:
 - less than my preservation age,
 - OR
 - between my preservation age and 65 years and have not retired from the workforce.
- I declare that the information provided on this form is correct.

Your spouse's signature

Date (dd/mm/yyyy)

Privacy

Please note that by sending legalsuper personal information about yourself, you are agreeing to the following:

- That you have read the legalsuper privacy statement which may be obtained from the *Superannuation Product Disclosure Statement* and understand how legalsuper intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
- That legalsuper can use your personal information for the purposes of running your superannuation account. If you have any questions about your rights under the privacy legislation, please call legalsuper on freecall **1800 060 312** (8am to 8pm [AEST] Monday to Friday).

Completing proof of identity requirements

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

legalsuper will accept:

ONE OF THE FOLLOWING DOCUMENTS ONLY:

- driver's licence issued under State or Territory law; or
- passport.

OR

ONE OF EACH OF THE FOLLOWING:

- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address;
- a bank statement or utility notice with your current mailing address.

Please note that all identification documents provided must be originals or certified copies.¹ We have attached a list of individuals who can certify documents.

A *certified copy* means a document that has been certified as a true copy of an original document by one of the following persons:

- a person who is enrolled on the roll of Supreme Court of a State or Territory, or the High Court of Australia, a legal practitioner (however described);
- a judge of a court;
- a magistrate;
- a chief executive officer of a Commonwealth court;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a notary public (for the purposes of the *Statutory Declarations Regulations 2018*);
- a police officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public;
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*);
- an officer with 5 or more continuous years of service with one or more financial institutions (for the purposes of the *Statutory Declarations Regulations 2018*); or
- a member of the Institute of Chartered Accountants in Australia and New Zealand, CPA Australia, the Association of Taxation and Management Accountants or the Institute of Public Accountants.

The certification should be dated and include the full name (both in print and signature), telephone number and type of authority (from above list) of the person certifying.

The document bearing the original certifying signature must be received by legalsuper, and therefore CANNOT be faxed or scanned and emailed. Although they may be qualifying members of the legal profession, members (as well as their family members) cannot certify their own documents.

¹ If your receiving spouse fund is a Self Managed Super Fund (SMSF), you can use electronic verification to prove your identity. Please call the Customer Service Team on **1800 060 312** (8am to 8pm [AEST] Monday to Friday) for further information.