

Superannuation Contributions

Section A: Your Details

Tax File Number (TFN)

You don't have to provide your TFN to your superannuation fund. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name

First Given Name

Other Given Names

Address

Suburb

State

Postcode

Date of Birth

Daytime Phone Number (include area code)

Email Address

Section B: Your Superannuation Fund's Details

Super Fund Name

Australian Business Number (ABN)

18 906 079 389

Member Account Number

IQ

Section C: Your Spouse's Details

Tax File Number (TFN)

You don't have to provide your TFN to your superannuation fund. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

Title

Mr☐

Mrs☐

Miss☐

Ms☐

Other

Family Name

First Given Name

Other Given Names

Address

Suburb

State

Postcode

Date of Birth

D

D

M

M

Y

Y

Y

Y

Daytime Phone Number (include area code)

Email Address

Section D: Your Spouse's Superannuation Fund's Details

Super Fund Name

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Member Account Number

Super Fund Address

Suburb

State

Postcode

Super Fund Daytime Phone Number (include area code)

Super Fund Email Address

Section E: Contributions Splitting Details

Financial Year Ending

This must be either the current financial year or the previous financial year. Contributions made before the start of the last financial year cannot be split.

Day/Month/Year

30 / 06 /

Taxed Splittable Contributions

Write the amount or percentage that your spouse is to receive. It cannot be more than 85% of the contributions you made in this category or more than your concessional contributions cap for the financial year. From 1 July 2019, the concessional contributions cap may be increased above the general concessional cap if you are eligible. To be eligible you must make concessional contributions in excess of the general concessional cap, have a total superannuation balance less than \$500,000 immediately prior to the financial year, and have unused concessional cap space from the previous 5 years (with 2018-19 financial year being the first year you can accrue unused concessional contributions). Your concessional contributions cap will equal the general concessional cap plus the previously unused concessional contributions made in excess of the general concessional contributions cap. Your increased concessional contributions cap, will be used to determine the maximum amount of taxed splittable contributions.

The contributions in this category include:

- employer contributions (including salary sacrifice contributions)
- personal contributions you made for yourself that you have advised your super fund you will claim as a tax deduction for (You advise your super fund by giving them a completed Notice of intent to claim or vary a deduction for personal super contributions form available from our website or your fund may have their own notice of intent form. You must do this before you lodge your Superannuation contributions splitting application).

Dollar Amount \$

OR Percentage

%

Untaxed Splittable Employer Contributions

Write the amount or percentage that your spouse is to receive.

These can only be employer contributions to your public sector superannuation fund that you are requesting be split with your spouse.

Dollar Amount \$

OR Percentage

%

Section F: Your Request and Declaration

I request that you split the contributions detailed in section E to the superannuation account of my spouse as detailed in section D. I declare that the information provided on this form is correct and confirm that the amount to be split is within the legislatively specified limits.

Name

Signature

Date

Section G: Your Spouse's Declaration

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

- less than my preservation age
- between my preservation age and 65 years, and not retired.

Name

Signature

Date

DDMMYYYY

How to return this form

Provide to your Adviser

Provide this form to your Financial Adviser to upload on your behalf via the IconiQ portal (Portfolios > Reports & Documents > Submit Superannuation Documents).

If required, you may post this form to:
GPO Box 1657
Melbourne VIC 3001

Privacy

When you provide instructions by completing this form, personal information about you is being collected. Information about how the Trustee collects, uses and discloses your personal information is set out in the Trustee's Privacy Statement, available at www.eqt.com.au/global/privacystatement.