



Superannuation contributions splitting application

Please complete all pages of this application in black or blue ink, using BLOCK letters. Please refer to the 'Important notes' on page 3, which will assist you to complete this form.

1. Applicant details (to be completed by the member)

superannuation fund name																																	
account number																																	

title	Mr	Mrs	Miss	Ms	other		date of birth	/	/																							
first name(s)																																
last name																																
residential address																																
suburb																state															postcode	
country																																
phone (after hours)																																
mobile																																
email																																

2. Spouse details (to be completed by the members spouse)

Note: If your surname differs to that of your spouse, we will require evidence such as a copy of a marriage certificate or joint bills.

title	Mr	Mrs	Miss	Ms	other		date of birth	/	/																							
first name(s)																																
last name																																
residential address																																
suburb																state															postcode	
country																																
phone (after hours)																																
mobile																																
email																																

Spouse fund details

Please nominate where you would like the contributions to be transferred, completing **one** of the following:

Self Managed Super Fund Service									
superannuation fund name									
account number									
or an existing super fund with another provider									
institution name									
postal address									
suburb							state		postcode
fund number							fund name		

3. Contribution splitting details (to be completed by the member)

Contribution splitting details

Note: If you intend to claim a tax deduction for personal superannuation contributions made during the relevant financial year you must provide us with notice of your intention to claim a deduction before you lodge a superannuation contribution splitting application.

For information regarding the general rules governing superannuation contribution splitting refer to the 'Important notes' on page 3.

To determine what your non-concessional and concessional contributions were for the period please contact us on **1800 645 227**. Alternatively email us at diysuper@perpetual.com.au.

financial year ending 30 / 06 /															
concessional contributions to be split	\$,						.00	or				%
non concessional contributions to be split	\$,						.00	or				%

Please note that once you split your personal contributions with your spouse, you will not be permitted to claim a tax deduction for these contributions at a later date.

4. Member request and declaration (to be completed by the member)

I request that you split the amount of contributions detailed in section 3 'Contribution splitting details' to the superannuation account of my spouse detailed in section 2 'Spouse fund details'. I declare that the information provided on this form is correct.

member name															
member signature							date		/		/				

5. Spouse declaration (to be completed by the members spouse)

I declare that at the date of this application, I am the spouse of the member and aged (please tick):

<input type="checkbox"/>	less than age 60 or
<input type="checkbox"/>	between 60 and 64 years and have not retired from the workforce or
<input type="checkbox"/>	between 60 and 64 years and have never been gainfully employed for 10 or more hours per week.
spouse name	<input type="text"/>
spouse signature	<input type="text"/>
date	<input type="text"/> / <input type="text"/> / <input type="text"/>

Important notes

- You may split:
 - Up to 85% of concessional contributions (this includes superannuation guarantee and other employer contributions, salary sacrifice and personal contributions for which a tax deduction has been claimed), up to the concessional contributions cap
- To be able to split contributions with your spouse, your spouse must meet one of the following criteria:
 - Your spouse has not yet reached age 60 or
 - Your spouse has reached age 60 but is aged less than 65 years and has not retired from the workforce or has never been gainfully employed for 10 or more hours per week.
- The definition of 'spouse' includes married and de-facto couples. A person is in a de-facto relationship when they are not legally married to their partner but living with them in a bona fide domestic basis in a relationship as a couple.
- Contributions made in a financial year may only be split after the end of that financial year (or during the financial year if you are withdrawing your entire benefit).
- You may only make one application to split contributions in the Perpetual Self Managed Super Fund Service per year.
- You have up until the following 30 June to request your contributions to be split. For example you will have until 30 June 2016 to split contributions made between 1 July 2014 and 30 June 2015.
- On receipt of a valid application ETSL will transfer the superannuation contribution amount as soon as practicable within 90 days.
- Your spouse will not be charged contribution fees when you transfer superannuation contribution splitting amounts into their superannuation account (that they hold with ETSL). Minimum balance and minimum investment requirements are also waived for your spouse when they receive a split superannuation contribution amount into their superannuation product or service with ETSL.
- We have the right to reject the application if we have not received all the required information or the application does not comply with requirements.