

Contributions Splitting

About this form

Complete this form with your spouse to split your super contributions into your spouse's account.

If you are applying to split contributions into your spouse's account please read and complete Sections A, C, D, E and F.

If you are the spouse who will be receiving the contributions please read and complete Sections B, E and G.

Contributions can be made to your spouse's TelstraSuper account, or to another super fund. If you wish to open a *TelstraSuper Personal Plus* account for your spouse to receive contributions, please complete Section D.

If you intend to claim a tax deduction for 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 Contributions Splitting form.

If you have any questions, please contact us on **1300 033 166**.

A

Your details

Title Mr Mrs Miss Ms Other

Surname Member number

Given name(s) Date of birth

Residential address (PO Box not acceptable)

Suburb State Postcode

Mobile Home phone no. Business phone no.

Email address

B

Receiving spouse details

Title Mr Mrs Miss Ms Other

Surname Member number

Given name(s) Date of birth

Mobile Home phone no. Business phone no.

Email address

C

Contributions splitting

I wish to split my contributions made in the financial year* ending 30 June

I wish to split \$ of my employer and pre-tax contributions

OR

I wish to split %[†] of my employer and pre-tax contributions

D

Contributions splitting details

Split contributions into an existing TelstraSuper account. My spouse is an existing TelstraSuper member.
Spouse's member number

Open a new TelstraSuper account for my spouse.
By ticking the box above you have indicated that your spouse wishes to join *TelstraSuper Personal Plus*. To facilitate this, we will send your spouse a product disclosure statement and application form.

Split contributions into another super fund.
Institution name

Address

ABN USI

Member account name

Member account number[‡]

* Your contributions split must be made between 1 July and 30 June in the year following the year in which the contributions were made, unless your entire benefit is to be transferred or cashed before the end of the financial year.

† You can only nominate to split a maximum of 85% of pre-tax contributions made to your account during the year.

‡ Reporting obligations require us to obtain the member account number for your spouse's fund. If the member number for your new fund is unavailable, please indicate by writing n/a or provide the institution's USI (Unique Superannuation Identifier).

E**Politically Exposed Person**

1. Are you a Politically Exposed Person (PEP)? Please refer to the definition of a PEP below

Yes No

2. If yes, please tick which PEP category applies to you

- a) I hold a prominent public position or function in a government body or an international organisation¹
 b) I am an immediate family member of a person referred to in (a) above
 c) I am a close associate of a person referred to in (a) above

Definition of a PEP

Politically Exposed Person or PEP means an individual:

(a) who holds a prominent public position or function in a government body or an international organisation¹, including:

- (i) Head of State or head of a country or government; or
- (ii) government minister or equivalent senior politician; or
- (iii) senior government official; or
- (iv) Judge of the High Court of Australia, the Federal Court of Australia or a Supreme Court of a State or Territory, or a Judge of a court of equivalent seniority in a foreign country or international organisation; or
- (v) governor of a central bank or any other position that has comparable influence to the Governor of the Reserve Bank of Australia; or
- (vi) senior foreign representative, ambassador, or high commissioner; or
- (vii) high-ranking member of the armed forces; or
- (viii) Board chair, chief executive, or chief financial officer of, or any other position that has comparable influence in, any State enterprise or international organisation; or

(b) who is an immediate family member of a person referred to in paragraph (a), including:

- (i) a spouse; or
- (ii) a de facto partner; or
- (iii) a child, a child's spouse or de facto partner; or
- (iv) a parent; or

(c) who is a close associate of a person referred to in paragraph (a), which means any individual who is known (having regard to information that is public or readily available) to have:

- (i) joint beneficial ownership² of a legal entity or legal arrangement with a person referred to in paragraph (a); or
- (ii) sole beneficial ownership² of a legal entity or legal arrangement that is known to exist for the benefit of a person referred to in paragraph (a).

1. International organisation essentially means an organisation established by a formal political agreement by two or more countries which has the status of an international treaty.

2. Beneficial ownership means directly or indirectly owning 25% or more of an entity or exercising operational or financial control over an entity.

F**Applicant authorisation**

To be eligible:

- your spouse must be less than their preservation age, or between their preservation age and 65 years and have not retired from the workforce and
- you and your spouse must presently live together on a genuine domestic basis in a relationship as a couple.

I certify that _____ (insert your spouse's name)

is my spouse and meets the criteria set out above to be eligible to receive contributions split from my account. I request that TelstraSuper split the contributions detailed in Section C to the super account of my spouse as detailed in Section D.

I understand that this contribution will be preserved.

If this contribution is being applied to an existing *TelstraSuper Personal Plus* account I acknowledge that the contribution will be applied within 90 days of the date TelstraSuper receives my contribution. If my spouse is opening a new *TelstraSuper Personal Plus* account to receive this contribution, I acknowledge that TelstraSuper cannot apply the contribution until my spouse's *TelstraSuper Personal Plus* application form is received and accepted.

Signature X _____

Date _____

G**Spouse authorisation**

I acknowledge that I have not reached my preservation age, or am aged between my preservation age and 65 years and have not retired from the workforce.

Signature X _____

Date _____

**Please return completed form to:
Telstra Super Pty Ltd, PO Box 14309, MELBOURNE VIC 8001**

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth). For further information on privacy please call Telstra Super Pty Ltd on 1300 033 166 or visit our website at telstrasuper.com.au to download a copy of our Privacy Policy and Privacy Collection Statement.

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