

# Member and Spouse Contribution



Complete this form to make a contribution by cheque to your account or your spouse's TelstraSuper account.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

## What you need to know

- Complete sections:
  - **1 & 2** to make a personal contribution to your account
  - **1 & 3** to make a personal contribution to your spouse's account
  - **4** to claim a tax deduction on a personal contribution that you are making with this form – this is not available for a spouse contribution or a First Home Super Saver re-contribution
- From age 67-74 (inclusive), we can only accept personal contributions if you satisfy the work test or the work test exemption applies
- Where your spouse is aged 67 or older, we can only accept contributions for your spouse if your spouse is aged 67 to 74 and meets the work test or the work test exemption applies
- Non-mandated, including member, contributions cannot be accepted for members aged 75 or over.
- Make cheque payable to Telstra Super Pty Ltd and attach it to this form
- We can only accept personal contributions if we have your tax file number (TFN)
- This contribution will remain preserved until a condition of release is met
- There are limits on the amount of pre and post-tax contributions you can make to your account each financial year. If you exceed the contribution caps you may have to pay extra tax
- This contribution will be invested in accordance with your future contributions profile (unless you attach a signed letter with specific investment instructions)
- If you want a personal contribution to count towards the current financial year's contributions caps, you must ensure this form is sent to TelstraSuper in sufficient time to allow for processing before the end of the financial year.

For more information about making personal contributions to your account including the current contribution caps read the **Additional Information About Your Super** guide available at [telstrasuper.com.au/pds](http://telstrasuper.com.au/pds)

## The work test and work test exemption

To satisfy the work test you must have been gainfully employed for at least 40 hours during a consecutive 30 day period within the financial year. You will be eligible for the work test exemption where your total superannuation balance is less than \$300,000 (at the end of the previous financial year) and you met the work test in the previous financial year.

## 1. Your details

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	
Surname					Member number	
Given name(s)					Date of birth	
Residential address						
Suburb		State		Postcode		
Mobile			Daytime contact no.			
Email address						

YOUR BASIC INFO



## 2. Make a personal contribution to your TelstraSuper account

Contribution amount \$

Tick this box if you are re-contributing a First Home Super Saver contribution.

Do you wish to claim a tax deduction for this contribution? If you're re-contributing a First Home Super Saver contribution you are unable to claim a tax deduction on this contribution.

Yes (complete section 4)

No

**Your signature and declaration**

I declare that I am:

under age 67, **OR**

aged between 67 and 74 and have met the work test or work test exemption in the current financial year.

Signature X  Date

AMOUNT



SIGN



SPOUSE  
AMOUNT

### 3. Make a personal contribution to your spouse's TelstraSuper account

Spouse\* name   
Spouse\* TelstraSuper member number  Contribution amount \$

#### Your signature and declaration

I declare that my spouse is:

- under age 67, **OR**  
 aged between 67 and 74 and has met the work test or work test exemption in the current financial year.

Signature X  Date

\* Spouse means a person to whom you are legally married, a person whether of the same or a different sex with whom you are in a relationship that is registered under an Australian State or Territory law, and a person whether of the same or a different sex with whom you are not legally married but who lives with you on a genuine domestic basis as a couple. The term spouse does not include a person who lives separately and apart from you on a permanent basis.

SIGN

### 4. Notice of intent to claim a tax deduction for this contribution

Only complete this section if you wish to claim a tax deduction for this contribution. Any contributions for which you claim a tax deduction will count towards your concessional contribution cap. If you're making a spouse contribution or re-contributing a First Home Super Saver contribution you are unable to claim a tax deduction on this contribution.

If you want to claim a tax deduction on a personal contribution, all the following requirements must be satisfied:

1. Check that the amount you wish to claim as tax deduction will not cause you to exceed your concessional contribution cap for the financial year.
2. Submit this form to TelstraSuper by the earlier of either:
  - a) before the day you lodge your tax return for the year in which you made the contributions; or
  - b) before the end of the financial year following the one in which you made the contributions.
3. TelstraSuper must hold the contributions that you wish to claim as a tax deduction and must not have begun to pay an income stream based, in whole or in part, on these contributions; and
4. TelstraSuper must continue to hold these contributions until you receive a written acknowledgment from us confirming we have received your notice and accepted it.

TelstraSuper will not be liable if you are ineligible to claim a tax deduction for your personal contributions where you have lodged your tax return without TelstraSuper's acknowledgment and acceptance of your notice.

Please note you cannot use this form to claim a tax deduction for the previous financial year. If you wish to claim a tax deduction for your personal contributions in an previous financial year, please complete and submit the **Notice of Intent to Claim a Tax Deduction** form to TelstraSuper.

#### Your signature and declaration

I wish to claim \$  as a tax deduction for the current financial year.

Signature X  Date

SIGN



#### We're here to help

If you have any questions or would like to talk to a financial adviser from TelstraSuper Financial Planning, please call us on **1300 033 166**.



#### Please return completed form to TelstraSuper:

PO Box 14309, MELBOURNE VIC 8001 or email [contact@telstrasuper.com.au](mailto:contact@telstrasuper.com.au)

#### Instructions for completing this form

Before sending this form to TelstraSuper, please check that you have:

- read and completed the form in its entirety.

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709 is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper). Telephone 1300 033 166 Website [telstrasuper.com.au](http://telstrasuper.com.au)

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