

## CONTRIBUTION SPLITTING FORM

Complete this form if you are intending to split your concessional (before tax) superannuation contributions with your spouse.

You can find detailed information about Simple Choice Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide Financial Services Guide and Privacy Policy, all of which can be obtained from [www.simplechoicesuper.com.au](http://www.simplechoicesuper.com.au) or on request by phoning **02 8556 7576**.

This form may be posted to **Simple Choice Super PO Box R1979 Royal Exchange NSW 1225** or scanned and emailed to [info@simplechoicesuper.com.au](mailto:info@simplechoicesuper.com.au).

### Section 1 Personal Details

Given Name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Member Number	<input type="text"/>		
Date of Birth	<input type="text"/>		
Mobile Phone Number	<input type="text"/>		
Email Address*	<input type="text"/>		
Residential Address	<input type="text"/>		
	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

\* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can elect to receive communications by post at any time by contacting Simple Choice Super on **02 8556 7576** or via email at [info@simplechoicesuper.com.au](mailto:info@simplechoicesuper.com.au) or in writing at **PO Box R1979 Royal Exchange NSW 1225**.

### Section 2 Spouse Details

Given Name(s)	<input type="text"/>
Surname	<input type="text"/>
Date of Birth	<input type="text"/>
Mobile Phone Number	<input type="text"/>
Email Address*	<input type="text"/>
Tax File Number^	<input type="text"/>



Residential Address

City

State

Postcode

\* By providing your spouse's email address, you consent and authorise us to send your spouse communications or information, including information required by law, via email or similar technologies. Your spouse's details will never be passed onto a third party other than in accordance with our Privacy Policy. Your spouse can elect to receive communications by post at any time by contacting Simple Choice Super on **02 8556 7576** or via email at [info@simplechoicesuper.com.au](mailto:info@simplechoicesuper.com.au) or in writing at **PO Box R1979 Royal Exchange NSW 1225**.

^ Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your TFN, but if you don't, the contribution cannot be accepted.

### Section 3 Your Spouse's Superannuation Account

Name of Fund

Fund ABN

Fund USI

Member Number

### Section 4 Split Contributions

The amount to be split into your spouse's account must not exceed 85% of your contributions for the financial year or exceed the concessional (before tax) contributions cap. Complete the amount to be split below.

Dollar amount

\$

or

Percentage amount

%

In the financial year ending

20

\* If you intend to claim a tax deduction for your personal concessional contributions, you must also complete the ATO's **Notice of Intention to Claim a Tax Deduction Form**. Download this form from the ATO's website at [www.ato.gov.au](http://www.ato.gov.au) and **attach a completed form to this application**.

### Section 5 Spouse Declaration

I confirm that I am (select one):

☐

Aged less than my preservation age.

☐

Aged between my preservation age and 65 and not permanently retired.

I consent to my personal information being used for the purpose of making this transaction.

.....

Signature

...../...../.....

Date



.....  
Print Name

## Section 6 Declaration and Signature

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By completing this form, I declare that:

- All the details I have provided in this form are true and correct.
- I have made an informed decision because I have read and understood the PDS and AIB to which this application applies.
- I am married to my spouse, or live with them on a genuine domestic basis.
- My spouse and I are Australian residents for tax purposes.
- I understand that I can only make one split application per financial year.
- I understand that once the contributions have been transferred to my spouse's account, they belong to my spouse.
- I accept that this contribution will remain preserved in the account of my spouse until a condition of release occurs, such as retirement after reaching preservation age.
- I understand that if the contribution exceeds a contribution cap, I may be subject to additional tax on the excess amount.
- I consent to my personal information being used for the purpose of making this transaction.
- I have read and understood the Privacy Statement and understand how Simple Choice Super will use my personal information.

.....  
Signature

...../...../.....  
Date

.....  
Print Name

**PRIVACY STATEMENT:** By signing this form you consent to Simple Choice Super collecting and using your personal information to manage your superannuation account and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit [www.simplechoicesuper.com.au](http://www.simplechoicesuper.com.au) or phone **02 8556 7576**.