

Why we need your TFN

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

I agree to provide my tax file number under the conditions stated above Yes No

My TFN is

Signature (please sign here)

X

Date

Receiving spouse's details

Mr Mrs Miss Ms Dr

Sex M/F

Date of birth

Surname

Given names

Street number

Street name

Suburb/Town/City

State

Postcode

Contact telephone number

Other telephone number

Email address

Your Spouse's Tax File Number (TFN)

TWUSUPER is prohibited by legislation from accepting any personal contributions (including from contribution splits) unless we have your TFN.

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I agree to provide my tax file number under the conditions stated above Yes No

Receiving spouse's TFN

Receiving spouse's signature (please sign here)

X

Date

Receiving spouse's fund details

Is your spouse a member of TWUSUPER or one of its divisions?

Yes No

If YES, your spouse's member number

If No, and your spouse would like to become a member of the Fund, call the Customer Service Team on 1800 222 071 for a Membership application form. Your spouse must have a superannuation account in place before you lodge this Contributions splitting application form.

OR

Receiving spouse's fund other than TWUSUPER

Name of fund

Policy/Member number

The fund's Australian business number (ABN)

Superannuation product identification number (SPIN)

Street number

Street name

Suburb/Town/City

State

Postcode

Contribution splitting details

Please split contributions for the Financial year ended

3 0 / 0 6 /

Important Note: Only Concessional super contributions can be split. Concessional contributions include employer contributions such as SG, award and voluntary employer contributions and salary sacrifice contributions.

Concessional contributions to be split

\$

You can split the lesser of 85% of your concessional contributions or the concessional contributions cap for that financial year with your spouse.

Your remaining account balance after the split (including fees) must be a minimum of \$5,000.

Note: If you are self-employed and intend to claim a tax deduction for personal contributions made during the financial year shown, you must claim your tax deduction before you return this contributions splitting application.

Your Declaration

- I request that you split the contributions shown above to my spouse's nominated account.
- I understand that, if my spouse's superannuation account is not with TWUSUPER or one of its divisions, a contributions splitting fee of \$55 will be deducted from my account in TWUSUPER.
- I understand that I must maintain a minimum balance of \$5,000 in my TWUSUPER account.
- I understand that all split contributions to my spouse's account will become part of their preserved benefit.
- I declare that the information provided on this form is true and correct.

Signature (please sign here)

Date

Your spouse's Declaration

- I declare that at the date of this application I am the spouse (married or de facto of the same or opposite sex) of the person making this application.
- I declare that I am aged:
 - less than my preservation age, OR
 - between my preservation age and 65 years and I have not retired from the workforce.

Signature of receiving spouse (please sign here)

Date

Who can certify your identification documents?

All copied pages of your original proof of identification documents need to be certified as true copies by one of the people listed below.

The person who is authorised to certify documents must sight the original and the copy and make sure that both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, business hours telephone number, qualification (eg: justice of the peace, Australia Post employee etc), registration number (if applicable) and date.

- A TWUSUPER Client Relations Officer;
- A justice of the peace;
- A notary public;
- A police officer;
- An Australia Post officer – A permanent employee of Australia Post with 2 or more years of continuous service who is employed in an office supplying postal services to the public;
- An Australia Post manager – An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- A financial planner – An officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having 2 or more continuous years of service with one or more licensees;
- A bank officer – An officer with 2 or more continuous years of service with one or more financial institutions, for the purposes of the Statutory Declaration Regulations 1993;
- An accountant – A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership;
- A lawyer – A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner, (howsoever described);
- A finance company officer – A finance company officer with 2 or more continuous years of service with one or more finance companies, for the purposes of the Statutory Declaration Regulations 1993;
- A magistrate;
- A judge of a court;
- A registrar or deputy registrar of a court;
- A chief executive officer of a Commonwealth court;
- An Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*).

We respect your privacy

The information we collect in this form will be used solely to process your contributions splitting application. TWUSUPER's Member Information Booklet explains how we collect, use and protect your personal information. Call us on 1800 222 071 (1800 808 799 for Transuper) or visit www.twusuper.com.au for a copy.

Checklist

Use this checklist to make sure your application is complete.



- I, as the member whose contributions will be split, have provided certified copies of my proof of identity.
- We have provided our Tax File Numbers.

- We have completed all sections of the form and signed the statutory declarations.



Send your completed form and proof of identity to: TWUSUPER, Locked Bag 5094, Parramatta NSW 2124