

# Contributions Splitting

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

## RED SECTIONS FOR YOUR INFORMATION

## GREY SECTIONS TO FILL OUT

### Before you start

- Member applying to split contributions into spouse's account please read and complete **sections 1, 3, 4, 5 and 6**
- Spouse receiving contributions please read and complete **sections 2, 5 and 7**
- Contributions can be made to your spouse's TelstraSuper account, or to another super fund. To open a TelstraSuper Personal Plus account for your spouse to receive contributions, read the **TelstraSuper Personal Plus Product Disclosure Statement** available at [telstrasuper.com.au/pds](https://telstrasuper.com.au/pds) and complete the online **TelstraSuper Personal Plus Application** form via [telstrasuper.com.au/join](https://telstrasuper.com.au/join) or download a form at [telstrasuper.com.au/forms](https://telstrasuper.com.au/forms)
- If you intend to claim a tax deduction for super contributions made during the relevant financial year, you must complete a **Notice of Intent to Claim a Tax Deduction** form available at [telstrasuper.com.au/forms](https://telstrasuper.com.au/forms) before completing this form.

### 1. Your details currently held by TelstraSuper

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/contact no.*				Email*		

\* Mandatory fields.

**Note:** We'll be unable to process this form if your contact or personal details are different to the details we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on **1300 033 166**, or
- complete a **Change of contact details** form to update your contact details or a **Change of member details** form to update your personal details available at [telstrasuper.com.au/forms](https://telstrasuper.com.au/forms) and submit it with this form.

### 2. Receiving spouse details

Title	Mr	Mrs	Miss	Ms	Other	
Surname					Member number (if applicable)	
Given name(s)					Date of birth	
Mobile/contact no.				Email		



### Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

### 3. 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 %<sup>†</sup> of my employer and pre-tax contributions

### 4. Contributions splitting details

Split contributions into my spouse's existing TelstraSuper account, member number:

OR

Split contributions into another super fund.

Institution name

Address

ABN

USI

Member account name

Member account number<sup>‡</sup>

### 5. Politically Exposed Person (PEP) status (you must complete this section if you are a PEP)

If you are a PEP, you must declare your PEP status each time you complete this form. A definition of a PEP is outlined in the important information section.

Are you a PEP?

Yes, I confirm I'm a politically exposed person

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 organisation

b) I am an immediate family member of a person referred to in (a) above,

and that person's name is

and public position is

c) I am a close associate of a person referred to in (a) above,

and that person's name is

and public position is

\* 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.

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

<sup>‡</sup> 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).

## 6. 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 3 to the super account of my spouse as detailed in section 4.

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.

SIGN  
↓

Signature

X

Date

## 7. 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.

SIGN  
↓

Signature

X

Date



**Please upload completed form via your SuperOnline account or return it to:**

PO Box 14309, MELBOURNE VIC 8001



### Definition of a Politically Exposed Person (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 organisation,<sup>1</sup> 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 ownership<sup>2</sup> of a legal entity or legal arrangement with a person referred to in paragraph (a); or
  - (ii) sole beneficial ownership<sup>2</sup> 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.