

Downsizer contribution into super



Complete this form to make a downsizer contribution by cheque following the sale of your home.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Before you start

- Read the Important Information section at the end of this form and visit the Australian Taxation Office (ATO) website at www.ato.gov.au for eligibility and other details about downsizer contributions
- The maximum downsizer contribution you can make is \$300,000
- We can only accept your downsizer contribution if we have your tax file number (TFN)
- Make cheque payable to 'Telstra Super Pty Ltd' and attach it to this form **OR** contact us on **1300 033 166** to make alternative arrangements
- This contribution will be invested in accordance with your future contributions profile
- This contribution will be included as a super asset for the purposes of Government income support assessments
- You cannot claim a personal super contribution deduction on this contribution
- If your contribution does not meet the downsizer eligibility requirements the ATO will notify us and, if we can accept it as a personal contribution, it will count toward your post-tax contribution cap, which may result in you exceeding your contributions cap. If we can't accept it as a personal contribution, the recalculated amount will be returned to you
- If you are signing this form on behalf of another person, you will need to provide identification in the member's name and attach an **Authorised Third Party Representative Identification** form available at telstrasuper.com.au/forms and include any certified documents as required.

1. 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/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 and submit it with this form.

2. Your contribution (maximum \$300,000)

Amount of your contribution \$



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. Your declaration and signature

By signing this form, I:

- declare that I have read and understood this form including the Important Information section
- confirm that I meet all of the eligibility requirements to make a downsizer contribution and declare that the information contained in this form is true and correct.

Each person who signs this form on behalf of the applicant named in this form:

- represents and warrants that they are lawfully appointed as guardian, administrator or attorney (as applicable), and
- declares that they are acting in accordance with the terms of the relevant power of attorney, guardianship order or administration order, including that if more than one person must act under the appointing document, all nominated persons must include their name, signature and date on this form below, and
- declares that their appointment remains valid and current as at the date of this form.

State your capacity (if applicable): Guardian Administrator Attorney

Name

Signature

X

Date

SIGN
↓



Important Information - Downsizer contributions into super

Eligibility to make a Downsizer contribution into super

To be eligible to make a downsizer contribution you must meet the following conditions specified by the Australian Taxation Office (ATO).

- You must be 55 years or older.
- You must have sold your home after 1 July 2018
- Your home must have been owned by you or your spouse for 10 years or more prior to the sale
- Your home is in Australia and is not a caravan, houseboat or other mobile home
- The proceeds (capital gain or loss) from the sale are either exempt or partially exempt from capital gains tax (CGT) under the main residence exemption, or would be entitled to such an exemption if the home was a CGT rather than a pre-CGT (acquired before 20 September 1985) asset
- You are making your downsizer contribution within 90 days of receiving the proceeds of sale
- You have not previously made a downsizer contribution to your super from the sale of another home.

Penalties may apply if the ATO identify that your downsizer contribution was not eligible and you had incorrectly declared that you were eligible to make such a contribution.

For more information visit the ATO website www.ato.gov.au



Please return completed form to TelstraSuper

PO Box 14309, MELBOURNE VIC 8001

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

- ☒ read the form in its entirety, including the Important Information section
- ☒ completed all mandatory fields

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

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