

Member and Spouse Contribution



Complete this form to make a personal 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 to 74 (including the period up to 28 days after the end of the month in which you reach age 75), we can only accept your personal pre-tax (concessional) contributions if you satisfy the work test or the work test exemption applies.
- We can only accept mandated employer contributions and eligible downsizer contributions in respect of members aged 75 and 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 each financial year. If you exceed the contribution caps you may have to pay extra tax
- Depending on your total super balance across all your super fund accounts you may not be eligible to make a post-tax contribution. Refer to the **Additional Information About Your Super** guide or ATO website for more information about caps on total super balance
- 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.

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 a previous financial year, please complete and submit the **Notice of Intent to Claim a Tax Deduction** form to TelstraSuper.

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

Do not use this form if you are re-contributing an amount you received as a COVID-19 early release of super payment. To make a COVID-19 early release re-contribution, download and complete a **Notice of re-contribution of COVID-19 early release amounts** form available at www.ato.gov.au and provide it to TelstraSuper before, or at the time you make your contribution.

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 across all your superannuation accounts is less than \$300,000 (at the end of the previous financial year) and you met the work test in the previous financial year.

YOUR
BASIC
INFO



1. Your details currently held by TelstraSuper

Title	Mr	Mrs	Miss	Ms	Other
Surname*					Member number*
Given name(s)*					Date of birth*
Residential address*					
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 those 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.



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**.

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 75[†], **OR**

aged 75 years or older and the contributions are downsizer contributions

Signature

X

Date

[†] Including the period up to 28 days after the end of the month in which you reach age 75.

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 75[†], **OR**

aged 75 years or older and the contributions are downsizer contributions

Signature

X

Date

[^] Spouse means a person whether of the same or a different sex with whom you are legally married under an Australian State or Territory law, or 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 to whom you are not legally married and who lives separately and apart from you on a permanent basis.

[†] Including the period up to 28 days after the end of the month in which you reach age 75.

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 to your super account in the current financial year. 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. You must be younger than age 75. If you are aged 67 to 74 (including the period up to 28 days after the end of the month in which you reach age 75), you must meet the work test or the work test exemption in the current financial year.
2. 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.
3. 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.
4. 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
5. 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.

Your signature and declaration

I wish to claim \$

as a tax deduction for the current financial year.

Signature

X

Date



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

PO Box 14309, MELBOURNE VIC 8001

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

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