





#### 4. Applicant request and declaration (to be completed by the member)

I request that you split the amount of contributions detailed in section 3 to the superannuation account of my spouse detailed in section 2. I declare that the information provided on this form is correct.

applicant name	<input type="text"/>	
applicant signature	<input type="text"/>	date <input type="text"/> / <input type="text"/> / <input type="text"/>

#### 5. Spouse declaration (to be completed by the members spouse)

I declare that at the date of this application, I am the spouse of the applicant and aged (please tick):

<input type="checkbox"/>	less than age 60 years <b>or</b>	
<input type="checkbox"/>	between age 60 years and 64 years and have not retired from the workforce <b>or</b>	
<input type="checkbox"/>	between age 60 years and 64 years and have never been gainfully employed for 10 or more hours per week.	
spouse name	<input type="text"/>	
spouse signature	<input type="text"/>	date <input type="text"/> / <input type="text"/> / <input type="text"/>

#### Important notes

- You may split up to 85% of concessional contributions (this includes superannuation guarantee and other employer contributions, salary sacrifice and personal contributions for which a tax deduction has been claimed) up to the concessional contributions cap.
- To be able to split contributions with your spouse, your spouse must meet one of the following criteria:
  - Your spouse has not yet reached age 60 or
  - Your spouse has reached age 60 but is aged less than 65 years and has not retired from the workforce or has never been gainfully employed for 10 or more hours per week.
- The definition of 'spouse' includes married and de-facto couples. A person is in a de-facto relationship when they are not legally married to their partner but living with them in a bona fide domestic basis in a relationship as a couple.
- If you are age 60 or more, you have reached your preservation age. If you are under age 60, you have not.
- Contributions made in a financial year may only be split after the end of that financial year (or during the financial year if you are withdrawing your entire benefit).
- You may only make one application to split contributions in the Perpetual WealthFocus Super Plan per year.
- You have up until the following 30 June to request your contributions to be split. For example you will have until 30 June 2025 to split contributions made between 1 July 2023 and 30 June 2024.
- On receipt of a valid application the Trustee will transfer the superannuation contribution amount as soon as practicable within 90 days.
- Minimum balance and minimum investment requirements are waived for your spouse when they receive a split superannuation contribution amount into their superannuation product or service with us.
- We have the right to reject the application if we have not received all the required information or the application does not comply with requirements.

Forward your completed form to:

Reply Paid 4171  
Perpetual WealthFocus Super Plan  
GPO Box 4171  
Sydney NSW 2001

Alternatively, you can send us a copy by email:  
Email: [superandpension@perpetual.com.au](mailto:superandpension@perpetual.com.au)