



Perpetual's DIY Super

Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

Perpetual Superannuation Limited ABN 84 008 416 881 AFSL 225246 RSE L0003315

This form can be used by members of the Self Managed Super Fund Service and members of the Small APRA Fund Service.

SUPERANNUATION CONTRIBUTIONS SPLITTING APPLICATION

Please complete all pages of this application in black or blue ink, using BLOCK letters. Please refer to the 'Important notes' on page 3, which will assist you to complete this form.

1. Applicant details (to be completed by the member)

superannuation fund name		
account number		
title Mr Mrs Miss Ms other	date of birth	
first name(s)		
last name		
residential address		
suburb	state	postcode
country		
phone (after hours)	phone (business hours)	
mobile	fax	
email		

2. Spouse details (to be completed by the members spouse)

Note: If your surname differs to that of your spouse, we will require evidence such as a copy of a marriage certificate or joint bills.

title Mr Mrs Miss Ms other	date of birth	
first name(s)		
last name		
residential address		
suburb	state	postcode
country		
phone (after hours)	phone (business hours)	
mobile	fax	
email		

Spouse fund details

Please nominate where you would like the contributions to be transferred, completing **one** of the following:

Perpetual Small APRA Fund Service or Self Managed Super Fund Service

superannuation fund name

account number

or an existing super fund with another provider

institution name

postal address

suburb state postcode

fund number fund name

3. Contribution splitting details (to be completed by the member)

Contribution splitting details

Note: If you intend to claim a tax deduction for personal superannuation contributions made during the relevant financial year you must provide us with notice of your intention to claim a deduction before you lodge a superannuation contribution splitting application.

For information regarding the general rules governing superannuation contribution splitting refer to the 'Important notes' on page 3. To determine what your non-concessional and concessional contributions were for the period please contact us on **1800 645 227**. Alternatively email us at diysuper@perpetual.com.au.

financial year ending 30 / 06 /

concessional contributions to be split \$.00 or %

non concessional contributions to be split \$.00 or %

Please note that once you split your personal contributions with your spouse, you will not be permitted to claim a tax deduction for these contributions at a later date.

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

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

member name

member signature [signature box] date

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 member and aged (please tick):

less than my preservation age **or**

between my preservation age and 64 years and have not retired from the workforce **or**

between my preservation age and 64 years and have never been gainfully employed for 10 or more hours per week.

spouse name

spouse
signature

date

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 their preservation age or
 - Your spouse has reached their preservation age 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.
- Preservation age will be:
 - 55 if you were born prior to 1 July 1960
 - 56 if you were born between 1 July 1960 & 30 June 1961
 - 57 if you were born between 1 July 1961 & 30 June 1962
 - 58 if you were born between 1 July 1962 & 30 June 1963
 - 59 if you were born between 1 July 1963 & 30 June 1964
 - 60 if were born after 30 June 1964.
- 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 Self Managed Super Fund Service or the Perpetual Small APRA Fund Service 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 2016 to split contributions made between 1 July 2014 and 30 June 2015.
- On receipt of a valid application Perpetual will transfer the superannuation contribution amount as soon as practicable within 90 days.
- Your spouse will not be charged contribution fees when you transfer superannuation contribution splitting amounts into their superannuation account (that they hold with Perpetual). Minimum balance and minimum investment requirements are also waived for your spouse when they receive a split superannuation contribution amount into their superannuation product or service with Perpetual.
- 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.