



CONTRIBUTION SPLITTING FORM

Complete this form if you are intending to split your concessional (before tax) superannuation contributions with your spouse.

You can find detailed information about Future Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide Financial Services Guide and Privacy Policy, all of which can be obtained from www.futuresuper.com.au or on request by phoning **1300 658 422**.

This form may be posted to **GPO Box 2754, Brisbane QLD 4001** or scanned and emailed to info@futuresuper.com.au.

Section 1 Personal details

Given Name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Member number	<input type="text"/>		
Date of Birth	<input type="text"/>		
Phone number	<input type="text"/>		
Email address ¹	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

Section 2 Receiving spouse details

Given Name(s)	<input type="text"/>
Surname	<input type="text"/>
Date of Birth	<input type="text"/>
Phone Number	<input type="text"/>
Email Address	<input type="text"/>
Tax File Number	<input type="text"/>

¹ By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can elect to receive communications by post at any time by contacting Future Super on 1300 658 422 or via email at info@futuresuper.com.au or in writing at GPO Box 2754, Brisbane QLD 4001.



Residential Address

City

State

Postcode

Section 3 Contribution Splitting Details

Contributions you split must be from the previous financial year, unless you are planning to close your account with Future Super, in which case you can also split the current financial year (provided the application is made before the withdrawal or rollover occurs).

IMPORTANT — You cannot split more than 85% of your eligible contributions² for the financial year you nominate. If you nominate an amount greater than the legislated concessional contribution cap, the amount transferred to your spouse will be reduced accordingly.

Previous financial year:

30 June

Amount

\$

OR

Percentage

%

Current financial year: If completing this row, please ensure that this form is submitted with a Withdrawal Form.

30 June

Amount

\$

OR

Percentage

%

Section 4 Superannuation Account Details – Receiving Spouse

My spouse is (*select one*):

A member of Future Super

Member Number

A member of another fund³

Name of Fund

Fund ABN

Fund USI

Member Number

² Eligible contributions include employer contributions (including salary sacrifice contributions) and personal contributions¹ you have made for which you have claimed a tax deduction. You must have claimed the tax deduction before you lodge this form in relation to personal contributions. To claim a tax deduction on personal contributions, you need to advise the Fund by providing a completed Notice of intent to claim or vary a deduction for personal super contributions form available from the Australian Tax Office website. You must do this before you lodge your Superannuation contributions splitting application.

³ A transfer to another fund cannot occur without the ABN and USI of the fund, and your spouse's Member Number for that fund.



Section 5 Declarations and Signature – Receiving Spouse

By completing this section of the form, I declare that:

- I am the spouse of the applicant.
- I am married to my spouse or live with my spouse on a genuine domestic basis.
- I (*select one*):
 - Have not reached my preservation age.
 - Am between my preservation age and age 65 and have not permanently retired from the workforce.
- I understand that this contribution will remain preserved in my account until a condition of release occurs, such as retiring after reaching my preservation age or reaching age 65.
- I have read the Privacy Statement (below) and consent to Future Super using my personal information for the purposes as stated.

x

.....
Signature of Receiving Spouse

...../...../.....
Date

Please ensure that this is an original signature. We are unable to accept electronic signatures.

.....
Print Name



Section 6 Declaration and Signature

By completing this form, I declare that:

- All the details I have provided in this form are true and correct.
- I have made an informed decision because I have read and understood the PDS and AIB to which this application applies.
- I am married to my spouse or live with them on a genuine domestic basis.
- My spouse and I are Australian residents for tax purposes.
- I understand that I can only make one split application per financial year.
- I understand that once the contributions have been transferred to my spouse's account, they belong to my spouse.
- I accept that this contribution will remain preserved in the account of my spouse until a condition of release occurs, such as retirement after reaching preservation age.
- I understand that if the contribution exceeds a contribution cap, I may be subject to additional tax on the excess amount.
- I consent to my personal information being used for the purpose of making this transaction.
- I have read and understood the Privacy Statement and understand how Future Super will use my personal information.

.....
Signature

...../...../.....
Date

.....
Print Name

PRIVACY STATEMENT: By signing this form you consent to Future Super collecting and using your personal information to manage your superannuation account and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit www.futuresuper.com.au or phone **1300 658 422**.