

Contributions splitting application

Use this form to transfer contributions made to your legalsuper account into your spouse's super. You are required to satisfy the 'ID Requirements' set out over the page, so that we are able to verify your identity.

Please use **BLOCK letters and black ink** when completing this form.

Return this completed form to:

legalsuper
 Locked Bag 5081
 Parramatta NSW 2124
 Phone: 1800 060 312
 Fax: 1800 614 431

Email: mail@legalsuper.com.au

1. Your details

legalsuper Membership Number

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone Number

Mobile Number

Email

2. Receiving spouse details

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone Number

Mobile Number

Email

3. Receiving spouse fund details

Is your spouse a legalsuper member?

If yes, your spouse's legalsuper membership number

If no, and your spouse would like to be a member of legalsuper, call the Customer Service Team on **1800 060 312** for a *Membership application* form. Your spouse must have a superannuation account in place before you lodge this *Contributions splitting application*.

OR

Receiving spouse's fund (other than legalsuper)

Name of fund

Policy/member number

The fund's Australian business number (ABN)

The fund's superannuation fund number (SFN)

Superannuation product identification number (SPIN)

Postal Address

Town or Suburb

State Postcode

4. Contribution splitting details

Financial year ended (dd/mm/yyyy)

3 0 0 6 2 0

Taxed contributions to be split

\$

e.g. employer and salary sacrifice contributions. You can split up to 85% of these contributions.

Untaxed contributions to be split

\$

e.g. member contributions, Government co-contributions. You can split up to 100% of these contributions.

Your remaining account balance after the split (including fees) must have a minimum balance of \$5,000.

Note: If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the Trustee notice of your intention to claim a deduction before you lodge this *Contributions splitting application*.

5. Declaration

Your request and declaration

- I request that you split the contributions shown in Section 4: 'Contributions splitting details', to my spouse's superannuation account as shown in Section 3: 'Receiving spouse fund details'.
- I understand that, if my spouse's superannuation account is not with legalsuper, a contributions splitting fee of \$55 will be deducted from my account in legalsuper.
- I understand that I must maintain a minimum balance of \$5,000 in my legalsuper account.
- I understand that all split contributions to my spouse's account will be preserved.
- I declare that the information provided on this form is correct.

Your signature

Date (dd/mm/yyyy)

Your spouse's declaration

- I declare that at the date of this application I am the spouse (married or de facto of the same or opposite sex) of the person making this application.
- I declare that I am aged:
 - less than my preservation age,
 - OR
 - between my preservation age and 65 years and have not retired from the workforce.
- I declare that the information provided on this form is correct.

Your spouse's signature

Date (dd/mm/yyyy)

Privacy

Please note that by sending legalsuper personal information about yourself, you are agreeing to the following:

- That you have read the legalsuper privacy statement which may be obtained from the Superannuation Product Disclosure Statement and understand how legalsuper intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
- That legalsuper can use your personal information for the purposes of running your superannuation account. If you have any questions about your rights under the privacy legislation, please call legalsuper on freecall **1800 060 312**.

Completing proof of identity requirements

You will need to provide certified documentation with this request to prove you are the person to whom the entitlements claimed belong.

The following documents may be used:

Benefits less than \$5000

Either an original or a *certified copy* of **one** of the following documents:

- A current Driver's licence issued under State or Territory law;
- An Australian Passport (the passport must be current or must have expired in the last two years);
- A Passport that contains a photograph and your signature issued by a foreign government, the United Nations or an agency of the United Nations that, if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

Benefits over \$5000 or claiming retirement/cash payment

You will need to provide **one** of the documents specified above in addition to **one** current bill or bank statement with current mailing address.

If you are unable to provide the documents requested above, contact legalsuper on **1800 060 312** to confirm which alternative documents you may provide.

Please note that all identification documents provided must be originals or certified copies. We have attached a list of individuals who can certify documents.

A *certified copy* means a document that has been certified as a true copy of an original document by one of the following persons:

- a person who is enrolled on the roll of Supreme Court of a State or Territory, or the High Court of Australia, a legal practitioner (however described);
- a judge of a court;
- a magistrate;
- a chief executive officer of a Commonwealth court;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a notary public (for the purposes of the Statutory Declaration Regulations 1993);
- a police officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public;
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*);
- an officer with 2 or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993);
- an officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees;
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.