

Refund or Reclassify Contributions Form

Please complete this form to request a refund or reclassification of a contribution made in error. This form can also be used by employers and needs to be signed by the primary contact on the employer's account. Please complete a separate form for each employee.

Please note: all refund or reclassification requests are subject to Legal Super Pty Ltd as trustee (**Trustee**) of legalsuper being satisfied that the contribution was made in error.

Please use **BLOCK LETTERS** and **BLACK INK** when completing this form. This request will be invalid if unsigned. Insert **X** when you have to choose an option.

Return this completed form to either:

Email: mail@legalsuper.com.au

OR

Post: legalsuper

Locked Bag 5081

Parramatta NSW 2124

Phone: 1800 060 312

SECTION 1

Employer details

Employer name

legalsuper employer number

Australian Business Number (ABN)

Primary contact person

Postal address

Town or Suburb

State

Postcode

Contact number

Email

Member details

legalsuper membership number

Surname

Given names

Date of birth (dd/mm/yyyy)

Contribution details

Contribution Method

EFT Bpay Cheque Direct debit Clearing house

Contribution date (dd/mm/yyyy)

Contribution period (dd/mm/yyyy)

to

Contribution amount/s \$, .

Contribution type/s

Super guarantee (SG) Member voluntary
 Employer additional (non SG) Salary sacrifice

SECTION 2

CHOOSE FROM ONE OF THE OPTIONS BELOW AND COMPLETE THE REQUIRED DETAILS:

1. Refund the contribution

Note: The final refunded amount may be adjusted for negative investment earnings, tax or expenses incurred by the Trustee. If approved, the payment will be returned via EFT to the following bank account:

Bank / Financial institution name

Bank account name (must be in the business name)

BSB number

Account number

Note: For refund requests of \$5,000 payments or more, or over 12 months old, we require a bank statement evidencing the contribution made.

OR

2. Reclassify the contribution on the member's super account:

Contribution period (dd/mm/yyyy)

to

Super guarantee contribution: \$, .

Salary sacrifice contribution: \$, .

Member voluntary (after tax contribution): \$, .

