

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):

<input type="checkbox"/>	less than my preservation age or
<input type="checkbox"/>	between my preservation age and 64 years and have not retired from the workforce or
<input type="checkbox"/>	between my preservation age 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 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 Perpetual's DIY Super Trustee Service or DIY Super SMSF 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 2011 to split contributions made between 1 July 2009 and 30 June 2010.
- 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.