



## Perpetual's Select Superannuation Plan

Perpetual Superannuation Limited ABN 84 008 416 831 RSE L0003315 RSE R1057034

Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034

# Superannuation contributions splitting application form

Please complete all pages of this application in black 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)

client number																					account number																				
title	Mr	Mrs	Miss	Ms	other																date of birth		/		/																
first name(s)																																									
last name																																									
c/- (if applicable)																																									
postal address																																									
suburb																																									
state																																									
postcode																																									
phone (after hours)																																									
phone (business hours)																																									
mobile																																									
fax																																									
email																																									

### 1. 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																																							
postal address																																							
suburb																																							
state																																							
postcode																																							
phone (after hours)																																							
phone (business hours)																																							
mobile																																							
fax																																							
email																																							

### Spouse rollover details

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

<b>Perpetual WealthFocus Super Plan</b>																																						
client number																				account number																		
<b>or Perpetual's Select Superannuation Plan</b>																																						
client number																				account number																		



**spouse rollover details (continued)**

<b>or Perpetual's DIY Super Trustee Service and SMSF Service</b>																						
account number												fund name										
<b>or an existing super fund with another provider</b>																						
institution name																						
postal address																						
suburb												state				postcode						
fund number												fund name										

To become a member of Perpetual's Select Superannuation Plan, your spouse will need to consider the information contained in the current Perpetual's Select Superannuation Plan and Pension Plan Product Disclosure Statement (PDS) before they complete and return the Application form included in the PDS (together with this Superannuation Contributions Splitting Application form). Your spouse may wish to speak to a financial adviser when considering this.

For more information about Perpetual's Select Superannuation Plan or to obtain a copy of Perpetual's Select Superannuation Plan and Pension Plan PDS, please contact your Select Relationship Manager or the Select Client Service Team on 1800 003 001. Alternatively, email [selectfunds@perpetual.com.au](mailto:selectfunds@perpetual.com.au).

**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, as trustee of Perpetual's Select Superannuation Plan, 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 after-tax and concessional contributions were for the period please contact the Select Client Service Team on 1800 003 001. Alternatively email us at [selectfunds@perpetual.com.au](mailto:selectfunds@perpetual.com.au).

financial year ending	30/06/															
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. Applicant request and declaration (to be completed by the member)**

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

applicant name														
signature of applicant(s)														
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 applicant 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 style="width: 100%; height: 15px;" type="text"/>
spouse signature	<input style="width: 100%; height: 30px;" type="text"/>
date	<input style="width: 20px; height: 15px;" type="text"/> / <input style="width: 20px; height: 15px;" type="text"/> / <input style="width: 20px; height: 15px;" 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 Select Superannuation Plan 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 2008 to split contributions made between 1 July 2006 and 30 June 2007.
- 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 contributions 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.