

Spouse rollover details (continued)

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

To become a member of the Perpetual WealthFocus Super Plan, your spouse will need to consider the information contained in the current Perpetual WealthFocus Super 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 the Perpetual WealthFocus Super Plan or to obtain a copy of the Perpetual WealthFocus Super Plan and Pension Plan PDS, please contact your financial adviser or call the Perpetual Investor Service Centre on 1800 022 033. Alternatively, email us at investments@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 the Perpetual WealthFocus Super 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 Perpetual Investor Service Centre on 1800 022 033. Alternatively email us at investments@perpetual.com.au.

financial year ending	30/06/								
concessional contributions to be split	\$,					.00
after-tax contributions to be split	\$,					.00

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. In addition you may split up to 100% of after-tax contributions made before 5 April 2007.

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												
applicant signature						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):

less than my preservation age **or**
 between my preservation age and 64 years and have not retired from the workforce **or**
 between my preservation age and 64 years and have never been gainfully employed for 10 or more hours per week.

spouse name

spouse signature

date / /

Important notes

- You may split:
 - Up to 100% of after-tax contributions (formerly known as undeducted contributions and now referred to in the law as non-concessional contributions and government co-contributions) made before 5 April 2007. Please note that once these contributions are split they will form part of your spouse’s taxable component.
 - 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 the Perpetual WealthFocus Super 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.