

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)

member number																											
title	Mr	Mrs	Miss	Ms	Other												date of birth	D	D	/	M	M	/	Y	Y	Y	Y
first name(s)																											
last name																											
c/- (if applicable)																											
postal address																											
suburb																	state			postcode							
phone																											
email address																											

2. 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	D	D	/	M	M	/	Y	Y	Y	Y
first name(s)																											
last name																											
postal address																											
suburb																	state			postcode							
phone																											
email address																											

2. Spouse details (continued)

Spouse rollover details

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

[illegible]

To become a member of the Perpetual WealthFocus Super Plan, your spouse will need to consider the information contained in the current 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 PDS, please contact your financial adviser or call our Member Services on 1800 011 022. Alternatively, email us at superandpension@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 concessional contributions were for the period please contact our Member Services on 1800 011 022. Alternatively email us at superandpension@perpetual.com.au.

financial year ending 30/06/2020

concessional contributions to be split \$1,000.00 or 85% concessional contributions

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

applicant signature

date

/

/

5. Spouse declaration (to be completed by the member's spouse)

I declare that at the date of this application, I am the spouse of the applicant and aged (please tick):

☐

less than age 60 years **or**

☐

between age 60 years and 65 years and have not retired from the workforce **or**

☐

between age 60 years and 65 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 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 age 60 or
 - Your spouse has reached age 60 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.
- 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 2026 to split contributions made between 1 July 2024 and 30 June 2025.
- On receipt of a valid application the Trustee will transfer the superannuation contribution amount as soon as practicable within 90 days.
- Minimum balance and minimum investment requirements are waived for your spouse when they receive a split superannuation contribution amount into their superannuation product or service with us.
- 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.

Forward your completed form to:
Perpetual WealthFocus Super and Pension
Reply Paid 92151
PO Box 617
Parramatta NSW 2124

Alternatively, you can send us a copy by email:
Email: superandpension@perpetual.com.au