SUPERANNUATION CONTRIBUTIONS SPLITTING APPLICATION FORM

Please complete all pages of this application in black or blue 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 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 / /

first name(s)

last name

postal address

suburb

state

postcode

phone (after hours)

phone (business hours)

mobile

fax

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:

Perpetual WealthFocus Super/Wholesale Super Plan

client number account number

or Perpetual's Select Superannuation Plan

client number

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/Wholesale 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/Wholesale Super Plan or to obtain a copy of the Perpetual WealthFocus Super/Wholesale Super 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/Wholesale 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 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

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 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 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/Wholesale 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 2017 to split contributions made between 1 July 2015 and 30 June 2016.
- On receipt of a valid application Perpetual 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 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.

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