



# Perpetual WealthFocus Super Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315  
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

## 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:

<b>Perpetual WealthFocus Super Plan</b>			
client number	<input type="text"/>	account number	<input type="text"/>
<b>or Perpetual's Select Superannuation Plan</b>			
client number	<input type="text"/>		
<b>or Perpetual's DIY Super Trustee Service and SMSF Service</b>			
account number	<input type="text"/>	fund name	<input type="text"/>
<b>or an existing super fund with another provider</b>			
institution name	<input type="text"/>		
postal address	<input type="text"/>		
suburb	<input type="text"/>	state	<input type="text"/>
postcode	<input type="text"/>		
fund number	<input type="text"/>	fund name	<input type="text"/>

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 the Perpetual Investor Service Centre on 1800 022 033. Alternatively, email us at [investments@perpetual.com.au](mailto: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 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](mailto:investments@perpetual.com.au).

financial year ending	30/06/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
concessional contributions to be split	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	, <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	.00	or	<input type="text"/>	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	<input type="text"/>																
applicant signature	<input type="text"/>										date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>

## 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		
<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 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 2019 to split contributions made between 1 July 2017 and 30 June 2018.
- 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.