Suncorp Employee Superannuation Plan
Contribution splitting form

Issued 29 October 2011

Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958 AFSL 237905 RSE L0002059

Use this form to split your super contributions with your spouse.

Tips to help you complete this form

- Use blue or black pen and CAPITAL letters
- Use a cross (✗) to mark answer boxes
- Read the instructions below as well as 'Important notes'
- Complete all of the form, note that both the member and spouse need to sign and date on the last page

Any questions? If you'd like help completing this form, or if you have any questions, just call us on 1800 652 489

What is superannuation contributions splitting?

Suncorp allows you to split to your spouse concessional contributions made into your Suncorp Employee Superannuation Plan account last financial year or this financial year if you are transferring to another fund.

You can split the lesser of the applicable concessional contributions limit and 85% of any concessional contributions (which include compulsory employer contributions, salary sacrifice and personal contributions) up to the concessional contributions cap. These contributions must have been received into your Suncorp Employee Superannuation Plan account from 1 July 2011 and must be contributions for which you have claimed a tax deduction.

Who should use these instructions?

These instructions are for members and their spouse.
Please complete the following sections:
Member – 1, 2 and 4
Spouse – 3 and 5

Setting up a spouse account for your spouse within the Suncorp Employee Superannuation Plan

You can choose to set up an account for your spouse in the Suncorp Employee Superannuation Plan. Please contact us to get a copy of the current PDS and Member Booklet or download a copy from our website. You and your spouse should seek financial advice in relation to setting up a spouse account.

Completing this form

Section 1

Please fill in your personal details and Suncorp Employee Superannuation Plan account number so that we can identify you.

Section 2

Only contributions received after 1 July 2011 and made to your superannuation account in the last financial year or this financial year if you are transferring to another fund can be be split into your spouse's account.

Please specify the dollar, percentage or the maximum allowed amount of taxed and/or untaxed contributions that you are applying to be split to your spouse's superannuation account.

Section 3

Your spouse must complete their personal and superannuation fund details. Your spouse must have a superannuation account in place before the superannuation contributions splitting application is lodged.

Your spouse must be less than age 55 or between age 55 and 65 and not have retired from the workforce.

Section 4

Please read the declaration and if you agree, sign and date the application.

Section 5

Your spouse must also read the declaration, and if they agree, sign and date the application.

Important notes:

- Your spouse is your legal spouse or de-facto partner.
- If you intend to claim a tax deduction for your personal contributions made during the relevant financial year, you must give the Trustee notice of your intention to claim a tax deduction (s290-170 Notice of intent to deduct) before you lodge this application form. If you don't, the Trustee will reject your s290-170 Notice of intent to deduct.
- The financial year refers to the financial year in which the contributions were made into your account.
- Only one application to split contributions can be made each financial year.
- Applications to split contributions made in the current financial year can only be made when a member ceases their membership and withdraws/transfers their benefits from the Fund. A completed withdrawal form must be submitted with a contribution splitting application for the current financial year.
- To remain a member of the Fund, a minimum account balance of $1,200 must be maintained in your superannuation account. Please ensure that your application for contribution splitting doesn't reduce your current account balance to less than this threshold. If the requested dollar or percentage amount results in a current account balance of less than $1,200, we won't process your application. To find out how much you can split to your spouse's superannuation account, please call us on 1800 652 489.
- If the requested dollar or percentage amount exceeds the maximum amount that can be split, we won't process your application.

1. Personal details

Suncorp Employee Superannuation Plan account number

Title

Last name

Given name(s)

Date of birth d d / m m / y y y y

Daytime phone number

Mobile

2. Contribution splitting details

Financial year ending 30 June y y y y

Please specify the dollar or percentage amount of the contribution to be split. Alternatively, if you wish to split the maximum allowable amount, please cross the relevant box.

	Dollar amount	Percentage	Maximum allowed
Concessional contributions	$	or %	or ☐

3. Receiving spouse details

Title

Last name

Given name(s)

Date of birth d d / m m / y y y y

Postal address

Suburb/Town

State Postcode

Email

Name of fund to which the amount should be paid

☐ Suncorp Employee Superannuation Plan, if so spouse's account number

☐ Other, please complete below details

Fund name

Fund's Australian Business Number (ABN)

Fund's Superannuation Fund Number (SFN)

Fund's Superannuation Product Identification Number (SPIN)

Spouse's account number

If you're transferring to a self managed super fund, please provide evidence of your membership in the fund (in the form of either the Trustee meeting minutes or your contribution statement)

4. Member declaration and signature

I declare that:

- The information provided in this application form is complete and accurate. I understand that if any information in this form isn't correct or accurate this application may be refused
- I have read the important notes
- Where I intend to claim a tax deduction in regards to contributions made to Suncorp, I've lodged a s290-170 Notice of intent to deduct with the Trustee
- I authorise the deduction of the amounts listed in section 2 to be paid to my spouse's superannuation fund

Member signature ✗

Date d d / m m / y y y y

5. Spouse declaration and signature

I declare that at the date of this application I'm aged:

- Less than 55 years

  OR
- At least 55 years and under 65 years and haven't retired from the workforce

Receiving Spouse signature ✗

Date d d / m m / y y y y

Please send the completed form and any required attachments to:

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

or fax to: 07 3002 3259