

# Suncorp Staff Superannuation Plan Contribution splitting form



Issued 15 December 2009

SIS Super Pty Ltd (Trustee)  
ABN 19 064 490 820 AFSL 229851 RSE L0001649

Please complete this form in a blue or black pen, using BLOCK letters and cross (X) to mark answer boxes.

**Any questions?** If you have any questions about this form, just call the Staff Plan Administrator on 07 3167 9511 or 1800 652 489.

## What is superannuation contributions splitting?

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

You can split up to 85% of any concessional contributions (which include compulsory employer contributions, salary sacrifice and personal contributions) for which you have claimed a tax deduction made in the previous financial year.

## 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 Staff Plan.

You can choose to set up an account for your spouse with Staff Plan. Please contact us to get a copy of the current PDS or download a copy from [www.suncorp.com.au](http://www.suncorp.com.au) or contact your adviser. 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 Staff Plan account number so that we can identify you.

### Section 2

Only contributions made to your superannuation account last financial year or this financial year if you are transferring to another fund 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

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

The spouse must be less than age 55 or between age 55 and 65 and haven't permanently retired from the workforce.

### Section 4

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

### Section 5

Spouse to read the declaration, and if they agree, sign and date the application.

## 1. Member details

Account number	<input type="text"/>
Title	<input type="text"/>
Last name	<input type="text"/>
Given name(s)	<input type="text"/>
Date of birth	<input type="text"/>
Daytime phone number	<input type="text"/>
Mobile	<input type="text"/>

## 2. Contribution splitting details

Financial year ending 30 June

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	\$ <input type="text"/>	or <input type="text"/> %	or <input type="checkbox"/>

### 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 following the end of 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 the Staff Plan Administrator on 07 3167 9511 or 1800 652 489.
- If the requested dollar or percentage amount exceeds the maximum amount that can be split, we won't process your application.

