Suncorp WealthSmart™ Contribution splitting form

SUNCORP

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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 BLOCK letters
- Use a cross (✗) to mark answer boxes
- Read the instructions below as well as the Important notes information
- 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 13 11 55 and ask for 'Super'.

What is superannuation contributions splitting?

Suncorp allows Suncorp WealthSmart super 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 Suncorp WealthSmart

You can choose to set up an account for your spouse with Suncorp WealthSmart. Please contact us to get a copy of the current PDS or download a copy from 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 Suncorp WealthSmart 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 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

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.

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 $2,000 (Personal Super members) or $1,200 (Business Super members) 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 $2,000 (Personal Super members) or $1,200 (Business Super members), we won't process your application. To find out how much you can split to your spouse's superannuation account, please call us on 13 11 55.
- If the requested dollar or percentage amount exceeds the maximum amount that can be split, we won't process your application.

1. Member details

Suncorp WealthSmart 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 WealthSmart, 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 290-170 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 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 permanently 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 WealthSmart™
GPO Box 2585
Brisbane QLD 4001

or fax to: 1300 172 693