Super contributions splitting application

Use this form to split your contributions to your spouse

Please note: If you are splitting contributions to your spouse, you must **leave a minimum of $5,000** in your ElectricSuper account to keep your account open.

1. Your details

Tax file number (TFN)

You don't have to provide your TFN to your superannuation fund. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

My tax file number is:

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Given name(s)

Surname

Address

Suburb/Town

State

Postcode

Telephone (business hours)

Mobile

Email address

2. Your superannuation fund's details

Super fund name

Australian business number (ABN)

Member account number

3. Your spouse's details

Tax file number (TFN)

You don't have to provide your TFN to your superannuation fund. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

My tax file number is:

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Given name(s)

Surname

Address

Suburb/Town

State

Postcode

Telephone (business hours)

Mobile

Email address

4. Your spouse's superannuation fund details

Super fund name

Australian business number (ABN)

Unique Superannuation Identifier (USI)

Member account number

Super fund address

Suburb/Town

State

Postcode

Super fund daytime phone number (include area code)

Super fund email address

5. Contributions splitting details

Financial year ending

This must be either this current financial year or the previous financial year. You cannot apply to split contributions made to your account before the beginning of last financial year.

(dd/mm/yyyy)

Taxed splittable contributions

Write the amount or percentage that your spouse is to receive. It cannot be more than 85% of the contributions you made in this category or more than your concessional contributions cap for the financial year. From 1 July 2019, the concessional contributions cap may be increased above the general concessional cap if you are eligible. To be eligible you must make concessional contributions in excess of the general concessional cap, have a total superannuation balance less than $500,000 immediately prior to the financial year, and have unused concessional cap space from the previous 5 years (with 2018–19 financial year being the first year you can accrue unused concessional contributions). Your concessional contributions cap will equal the general concessional cap plus the previously unused concessional contributions made in excess of the general concessional contributions cap. Your increased concessional contributions cap will be used to determine the maximum amount of taxed splittable contributions.

The contributions in this category include:

- employer contributions (including salary sacrifice contributions)
- personal contributions you made for yourself that you have advised your super fund you will claim as a tax deduction for (You advise your super fund by giving them a completed Notice of intent to claim or vary a deduction for personal super contributions form available from our website or your fund may have their own notice of intent form. You must do this **before** you lodge your *Superannuation contributions splitting application*).

Dollar amount $ or percentage %

Untaxed splittable employer contributions

Write the amount or percentage that your spouse is to receive.

These can only be employer contributions to your public sector superannuation fund that you are requesting be split with your spouse.

Dollar amount $ or percentage %

6. Your request and declaration

I request that you split the contributions detailed in section 5 to the superannuation account of my spouse as detailed in section 4. I declare that the information provided on this form is correct and confirm that the amount to be split is within the legislatively specified limits.

Name (Print in BLOCK LETTERS)

Signature

(dd/mm/yyyy)

7. Your spouse's declaration

I declare that at the date of this application I am the spouse of the applicant and I am either:

- less than my preservation age
- between my preservation age and 65 years, and not retired.

Name (Print in BLOCK LETTERS)

Signature

(dd/mm/yyyy)

Lodge your form

electricsuper.admin@rs.mpms.mufg.com

or

Post to: ElectricSuper
PO Box 126 Parramatta NSW 2124

Your privacy

Refer to www.electricsuper.au/privacypolicy for information on how your provided information is used and how we treat your privacy.

Queries

1300 307 844
www.electricsuper.au

Issued by the Electricity Industry Superannuation Board ABN 42 457 486 237 as trustee of the Electricity Industry Superannuation Scheme ABN 57 923 283 236

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

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