

# The Portfolio Service SMSF

## Contribution notice

Fund name	
Fund reference number	

### 1. Member details

Please provide the details of the member who will receive this contribution.

Member's full name	
Member's account number	

### 2. Contribution type

If you intend to claim a tax deduction, you will need to provide a tax deduction notice to the trustees (Section 290-170). A copy of the notice can be obtained from the ATO website.

Member - concessional	\$	(if eligible, a tax deduction may be claimed)
Member - non concessional	\$	(not eligible to claim a tax deduction)
Spouse	\$	
Employer contribution - super guarantee	\$	
Employer contribution - additional	\$	
Salary sacrifice	\$	
Total contribution	\$	

### 3. Contribution method

Electronic funds transfer (EFT) made on

Cheque

In-specie

In-specie contributions must be made on an 'arm's-length' basis. In-specie contributions also count toward your contribution caps and CGT may be payable. You should consult your financial adviser before making an in-specie contribution. If private asset(s) are included, please also complete a 'Private asset request form' and attach it to this notice.

Asset name	ASX/APIR code	SRN / HIN or investor number	Units	Transfer date*	Consideration

\* The nominated transfer date must not be more than 30 days.

Market value must be current as at the date of transfer. If you have selected a market price that is not the closing price on the day, you must also supply documentary evidence verifying the amount.

We will prepare standard transfer form(s) for you to complete and return to us. However, if you would like to expedite the process of making an in-specie contribution, please attach a completed standard transfer form to this contribution notice. blank standard transfer form is available via our My Portfolio website.

To confirm the units held and the registration details, please also attach copies of your latest holding statements.

### 4. Member eligibility to contribute

Please select (✓) the box(es) to describe your age and eligibility to make or receive a contribution:

Under age 65

Aged 65 to 69 and

employer contributions will be made on my behalf (award and superannuation guarantee contributions only)

I have worked at least 40 hours in a period of not more than 30 consecutive days in the current financial year

Aged 70 to 74 and

employer contributions will be made on my behalf (award contributions only)

I have worked at least 40 hours in a period of not more than 30 consecutive days in the current financial year (member personal contributions and employer voluntary contributions only).

Aged 75 and over

employer contributions will be made on my behalf (award contributions only)

## 5. Employer contribution details

If an employer is making contributions on your behalf please provide their details.

Company's name			
Contact name	Contact telephone		
ABN	ACN		
Street address			
Suburb	State	Postcode	

## 6. Member declaration and signature

I declare that the information provided in this notice is true and correct.

Signed by	
Date	

Please return to us (together with your cheque if applicable) to:

Email: [forms@aetlimited.com.au](mailto:forms@aetlimited.com.au)

Fax: 1800 781 166

Or post:

**The Portfolio Service SMSF**

**Administration Services**

**GPO Box 546**

**Adelaide SA 5001**