

Superannuation contributions splitting application form

Please indicate which Plan the contribution is to be split is from:

- Superannuation Plan
- Super Essentials

1. Applicants details

Title	Surname	Given names	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address			
<input type="text"/>			
Suburb/town	State	Postcode	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (home)	Telephone (business)	Telephone (mobile)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Male	Female	Date of birth (dd/mm/yy)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

2. Receiving spouse details

Title	Surname	Given names	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address			
<input type="text"/>			
Suburb/town	State	Postcode	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (home)	Telephone (business)	Telephone (mobile)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Male	Female	Date of birth (dd/mm/yy)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

Is the contribution split going to be to a spouse account within TPS?

- Yes Please ensure that your spouse sets up an account in TPS prior to the split.
- No Go to section 3

3. Receiving fund details

Name of fund

Address of fund

Your fund's ABN

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Your fund's superannuation fund number (SFN)

Member account number

4. Contribution splitting details

Financial year ending / /

Taxed contributions (deductible)*

Dollar amount \$ or percentage %

* The amount that can be split in relation to a financial year is the lesser of:

- 85% of your concessional contributions or
- your concessional contribution cap.

For more information about contribution splitting please refer to the Product Disclosure Statement and speak to your financial planner.

Note: If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the trustee notice of your intention to claim a deduction before you lodge a superannuation contributions splitting application.

5. Receiving spouse declaration

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

- Less than my preservation age; OR
- Between my preservation age and 65 years and have not retired from the work force.

Name (please print)

Signature

Date

 / /

6. Applicant request and declaration

I request that you split the contributions detailed in section 4 to the superannuation account of my spouse as detailed in section 2. I declare that the information provided on the form is correct.

- I authorise the deduction from my investment portfolio of any fees, expenses and taxes payable.
- I agree to indemnify the trustee for all liabilities arising from applicant instructions.

Name (please print)

Signature

Date

Financial Planner only

Name

Phone number

AFSL holder

PortfolioNet account number

Signature

Date