

Contribution Splitting Form



Complete this form if you are intending to split your concessional (before tax) superannuation contributions with your spouse.

You can find detailed information about Slate Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide Financial Services Guide and Privacy Policy, all of which can be obtained from www.slatesuper.com.au or on request by phoning **02 8074 1772**.

This form may be posted to Slate Super PO Box R1979 Royal Exchange NSW 1225 or scanned and emailed to info@slatesuper.com.au.

1. Personal Details

Given Name(s)	Surname		
Member Number	Date of Birth		
	DD	MM	YYYY
Mobile Phone Number	Email Address*		
Residential Address	City	State	Postcode

* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can unsubscribe from our non-essential emails at any point or elect to receive communications by post by contacting Slate Super on **02 8074 1772** or via email at info@slatesuper.com.au or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

2. Spouse Details

Given Name(s)	Surname		
Mobile Phone Number	Date of Birth		
	DD	MM	YYYY
Email Address*	Tax File Number^		
Residential Address	City	State	Postcode

* By providing your spouse's email address, you consent and authorise us to send your spouse communications or information, including information required by law, via email or similar technologies. Your spouse's details will never be passed onto a third party other than in accordance with our Privacy Policy. Your spouse can unsubscribe from our non-essential emails at any point or elect to receive communications by post by contacting Slate Super on **02 8074 1772** or via email at info@slatesuper.com.au or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

^ Under the Superannuation Industry (Supervision) Act 1993, your spouse is not obliged to disclose their TFN, but if they don't, your contribution cannot be accepted. For more information, refer to the PDS or contact us on **02 8074 1772**.

3. Your Spouse's Superannuation Account

Name of Fund Fund ABN

Fund USI Member Number

4. Split Contributions

The amount to be split into your spouse's account must not exceed 85% of your contributions for the financial year or exceed the concessional (before tax) contributions cap. Complete the amount to be split below.

Dollar amount \$ or Percentage amount %

In the financial year ending

* If you intend to claim a tax deduction for your personal concessional contributions, you must also complete the ATO'S **Notice of Intention to Claim a Tax Deduction Form**. Download this form from the ATO's website at www.ato.gov.au/forms/notice-of-intent-to-claim-or-vary-a-deduction-for-personal-super-contributions/ and **attach a completed form to this application.**

5. Spouse Declaration

I confirm that I am (select one):

- Aged less than my preservation age.
- Aged between my preservation age and 65 and not permanently retired.

I consent to my personal information being used for the purpose of making this transaction.

Signature

Print name

Date

<input type="text" value="DD"/>	<input type="text" value="MM"/>	<input type="text" value="YYYY"/>
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6. Declaration and Signature

By completing this form, I declare that:

- All the details I have provided are true and correct.
- I have read and understood the Slate Super PDS and all related documents applicable to this contribution split.
- I have read the Privacy Statement (below) and understand how Slate Super will use my personal information.
- I am married to my spouse or live with them on a genuine domestic basis.
- My spouse and I are Australian residents for tax purposes.
- I understand that once the contributions have been transferred to my spouse's account, they belong to my spouse.
- I accept that this contribution will remain preserved in the account of my spouse until a condition of release occurs, such as retirement after reaching preservation age.
- I understand that if the contribution exceeds a contribution cap, I may be subject to additional tax on the excess amount.

Signature

Print name

Date

<input type="text" value="DD"/>	<input type="text" value="MM"/>	<input type="text" value="YYYY"/>
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PRIVACY STATEMENT: By signing this form you consent to Slate Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. To access your personal information or for a copy of our Privacy Policy, visit www.slatesuper.com.au, phone **02 8074 1772** or email us at info@slatesuper.com.au.