

Superannuation contributions splitting application

When completing this form

You can complete this form electronically or with a pen.

If you choose to use a pen:

- Print clearly in BLOCK LETTERS using a black pen only.
- Place **X** in ALL applicable boxes.

Section A: Your details

1 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).

2 Full name

Title:

Family name

First given name

Other given names

3 Address

Suburb/town

State/territory

Postcode

4 Date of birth

5 Daytime phone number (include area code)

6 Email address

Section B: Your superannuation fund's details

7 Super fund name

8 Australian business number (ABN)

9 Member account number

Section C: **Your spouse's details**

10 **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).

11 **Full name**

Title:

Family name

First given name

Other given names

12 **Address**

Suburb/town

State/territory

Postcode

13 **Date of birth**

14 **Daytime phone number** (include area code)

15 **Email address**

Section D: **Your spouse's superannuation fund details**

16 **Super fund name**

17 **ABN**

18 **Unique Superannuation Identifier (USI)**

19 **Member account number**

20 **Super fund address**

Suburb/town

State/territory

Postcode

21 **Super fund daytime phone number** (include area code)

22 **Super fund email address**

Section E: Contributions splitting details

23 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.

Day Month Year
3 0 / 0 6 /

24 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 %

25 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 %

Section F: Your request and declaration

I request that you split the contributions detailed in section E to the superannuation account of my spouse as detailed in section D. 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

Date

Section G: **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

Date

Privacy

The ATO is a government agency bound by the *Privacy Act 1988* in terms of collection and handling of personal information and tax file numbers (TFNs). For further information about privacy law notices go to ato.gov.au/privacy

- Send your completed application to your superannuation fund. You don't send this form to the ATO.