


# Superannuation contributions splitting application

Warning: This form has been designed to assist you to prepare the Australian Tax Office's Superannuation Worksheet. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

## 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 Sex

### 6 Daytime phone number (include area code)

### 7 Email address

## Section B: Your superannuation fund's details

### 8 Fund's name


### 9 Australian business number (ABN)

### 10 Member account number

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## Section C: Your spouse's details

### 11 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).

### 12 Full name

Title:

Family name

First given name

Other given names

### 13 Address

Suburb/town

State/territory

Postcode

### 14 Date of birth

### 15 Sex

### 16 Daytime phone number (include area code)

### 17 Email address

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

### 18 Fund's name

### 19 ABN

### 20 Member account number

## Section E: Contributions splitting details

### 21 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

3

0

/

Month

0

6

/

Year

### 22 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 the concessional contributions cap for the financial year.

The contributions in this category include:

- ☒ employer contributions (including salary sacrifice contributions)
- ☒ personal contributions you have advised your fund you will claim as a tax deduction (for example, because you are self-employed).

Dollar amount \$

✕

 OR

percentage

%

### 23 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.*

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 55 years old
- ☒ 55 to 64 years old and not retired.

Name (Print in BLOCK LETTERS)

Signature

Date