

CATHOLIC SUPER

Contributions splitting application



Address: GPO Box 180 Melbourne VIC 3001

Phone: 1300 655 002 **Fax:** (03) 9934 3465 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use BLOCK letters and black ink when completing this form. This request will be invalid if unsigned.

Use this form to transfer contributions made to your Catholic Super account into your spouse's super. (You are required to satisfy the 'Proof of Identity Requirements' set out on pages 3 and 4 so that we are able to verify your identify).

Section 1: Your details

Catholic Super Member Number	Date of Birth (dd/mm/yyyy)	Sex
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Postal Address		
PO Box / Street Number	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Residential Address		
Street Number	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (Business hours)	(Mobile)	
<input type="text"/>	<input type="text"/>	
Email		
<input type="text"/>		

Section 2: Receiving spouse details

Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Date of Birth (dd/mm/yyyy)	Sex	
<input type="text"/>	<input type="text"/>	
Postal Address		
PO Box / Street Number	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 2: Receiving spouse details *(continued)*

Residential Address

Street Number

Street Name

Suburb / Town

State

Postcode

I agree to provide my Tax File Number:

YES

NO

Tax File Number

Providing your Tax File Number (TFN)

It is not compulsory to provide Catholic Super with your TFN, however if you do not, you may pay more tax than you have to. We are also unable to accept personal member contributions if we do not have your TFN. For details regarding TFNs, refer to our Product Disclosure Statement on our website, or call 1300 655 002 to request a copy.

Section 3: Receiving spouse fund details

Is your spouse a Catholic Super member?

If yes, your spouse's member number

If no, and your spouse would like to be a member of Catholic Super, call us on 1300 655 002 for a Membership application form or use Join Online at www.csf.com.au. Your spouse must have a superannuation account in place before you lodge the Contributions splitting application.

OR

Receiving spouse's fund other than Catholic Super

Name of fund

Policy / Member number

The fund's Australian business number (ABN)

The fund's superannuation fund number (SFN)

Superannuation product identification number (SPIN)

Street Number / PO Box

Street Name

Suburb / Town

State

Postcode

Section 4: Contributions to be split

You can split up to 85% of concessional contributions (i.e. employer and salary sacrifice contributions) made to your account in the last financial year.

Please select a splitting option

85% of my total concessional contributions for the last financial year

this nominated amount

\$

Section 5: Declaration

Your request and declaration

- I request that you split the contributions shown in Contributions splitting details to my spouse's superannuation account as shown in Receiving spouse fund details.
- I understand that, a contributions splitting fee of \$60.50 will be deducted from my account in Catholic Super.
- I understand that I must maintain a minimum balance of \$5,000 in my Catholic Super account.
- I understand that all split contributions to my spouse's account will be preserved.
- I declare that the information provided on this form is correct.

Your signature

Date (dd/mm/yyyy)

Your spouse's declaration

- I declare that at the date of this application I am the spouse (married or de facto of the opposite sex) of the person making this application.
- I declare that I am aged
 - less than my preservation age, OR
 - between my preservation age and 65 years and have not retired from the workforce.
- I declare that the information provided on this form is correct.

Your spouse's signature

Date (dd/mm/yyyy)

Personal information

The personal information that Catholic Super collects is used to:

- process your application and requests,
- administer your super account and provide you with benefits and options,
- correspond with you in relation to your super account, benefits and options,
- conduct research about how to improve Catholic Super's service and products, and
- cross match your personal details with other superannuation funds to help locate any other superannuation accounts in your name.

If you choose not to give us your personal information, or provide us with incomplete or inaccurate personal information, we may not be able to provide you with all the benefits of Catholic Super. Unless required or authorised by law, we will only provide your personal information to authorised service providers who use the information to administer your account and provide services to you, such as to an insurance company that provides you with insurance cover. You are able to gain access to your personal information by asking for it. If you would like to request access to the personal information we hold about you, or want further information on how we handle personal information, please contact us.

Proof of Identity Requirements

You will need to provide **certified documentation** to prove you are the person to whom the superannuation entitlements belong.

Please tick the relevant box/es to indicate which of the following acceptable certified documents you have attached to this form.

(Only provide original documents if you are submitting this form in person at a Fund office).

EITHER:

One of the following documents only:

- A current driver's licence or permit issued under the law of a State or Territory; or
- A passport issued by the Commonwealth which can be up to two years out of date;

that contains a photograph of the person in whose name the document is issued.

OR

One of the following documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles you to financial benefits.

AND

- notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address, recording the provision of financial benefits (Not applicable if you are also providing a pension card)
- notice issued by the ATO within the past 12 months that contains your name and residential address
- notice issued by a local council or utilities provider within the past three months that contains your name and residential address.

If you are unable to provide accepted certified documents, please contact Catholic Super for other options.

Section 5: Declaration *(continued)*

Certification of personal documents

All copied pages of **original** proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below). The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date. The following people can certify copies of the originals as **true and correct** copies:

- a person enrolled on the roll of the Supreme Court of a State or Territory or the High Court of Australia, as a legal practitioner
- a judge of a court
- a magistrate
- a Chief Executive Officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a notary public officer *(for the purposes of the Statutory Declaration Regulations 1993)*
- a police officer
- a permanent employee of the Australian Postal Corporation with five or more years of continuous service who is employed in an office supplying postal services to the public
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*)
- a finance company officer with five or more years of continuous service with one or more finance companies *(for the purposes of the Statutory Declaration Regulations 1993)*
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees