

Contribution Splitting Request

You can use this form to split contributions with your spouse, including an opposite or same-sex de facto partner (with whom you live on a genuine domestic basis in a relationship as a couple or where your relationship is registered on a State or Territory relationship register).

Please read the *Important Notes* before completing this form.

Complete, sign and return this form by **fax to (02) 9261 3683 or (03) 9686 0377**.

Alternatively, you may post this form to Maritime Super, Locked Bag 2001, QVB Post Office NSW 1230.

Your Personal Details

Membership Category

Stevedores division

Seafarers division

Maritime Super division

Member Number

Title (Mr/Mrs/Ms/Miss etc)

Gender

Male

Female

Surname

Given Names

Postal Address

Date of Birth

 / /

Phone Number

Email Address

Receiving Spouse's Details

Member Number (if a member of Maritime Super)

Title (Mr/Mrs/Ms/Miss etc)

Surname

Given Names

Postal Address

Date of Birth

 / /

Phone Number

Email Address

Details of the Contributions to be Split

Financial year of contributions to be split

01/07/

to

30/06/

You may generally only split contributions after the end of the financial year (and within the next financial year). However, if you are transferring your whole benefit to another superannuation or rollover fund or withdrawing your total benefit, you may split contributions made in the current financial year.

What type of contributions would you like to split in favour of your spouse?

All splittable contributions

OR (choose one or more options)

Compulsory employer contributions

Personal contributions claimed as a tax deduction

Salary sacrifice contributions

Voluntary employer contributions

Allocated surplus

(If you are a Defined Benefit member, you may **only** split contributions to your voluntary contribution account)

How much of these contributions would you like to split in favour of your spouse? (select ONE option only)

Split the maximum amount of contributions (85% of contributions)

Split the following percentage of each splittable contribution

% (up to 85%)

Split the following amount of contributions

\$

For Contributory Accumulation members who were members of the Seafarers Retirement Fund on 30 June 2008

Are you a Contributory Accumulation member who was a member of the Seafarers Retirement Fund on 30 June 2008?

Yes – read and complete section below

No – go to the next section

If you were a Contributory or Non-Contributory member of the Seafarers Retirement Fund on 30 June 2008, you may be entitled to a minimum protected benefit under the rules of Maritime Super when you access benefits following retirement from the maritime industry. However, if you split contributions made to your core accumulation or Benchmark Salary accounts before retirement from the maritime industry, you will waive your right to any minimum protected benefit (now and in the future).

Before signing this request, you must select one of the following options below - without this, we will not action your request.

Tick (✓) the appropriate box below.

I do not have a minimum protected benefit as I have previously waived my right to the benefit; or

Despite anything else in this request, I only authorise the splitting of contributions to the extent that I will not waive my right to a minimum protected benefit. Call Member Services to find out how much you can split without waiving your rights to a minimum protected benefit; or

I agree to waive my rights to any minimum protected benefit – you must complete the *Authority to access Benchmark Salary or Core Accumulation Account(s) on transfer, contribution splitting and cashing form*, available from maritimesuper.com.au or by calling Member Services on 1800 757 607 and attach it to this form before you return it to us.

Spouse's Payment Instructions and Eligibility Declarations (this section MUST be completed by your Spouse)

Confirm your eligibility to have contributions split in your favour (select one option only):

I have not yet reached 55 years of age OR

I am between 55 and 65 years of age and I have not retired¹

¹ 'Retired' means that you are currently not (nor ever intending to) work for 10 or more hours a week, nor have left an employer after your 60th birthday.

Provide details of the complying superannuation fund to which you would like the contributions transferred if you do not have a current Maritime Super membership:

Name of Fund

ABN of Fund

RSE Registration No.

Address of Fund

Member Number

Phone Number

I confirm that the information provided above is correct and confirm that I have read, understood and accept the *Privacy information and consents* overleaf.

Spouse's Signature

Date

Member's Authorisation

I request the Trustee split the contributions, as detailed overleaf, in favour of my spouse. I confirm that the person named overleaf is my legal spouse or de facto partner.

I understand that I will not be able to make another request to split contributions for the noted financial year.

If the amount of contributions I have requested to be split exceeds the maximum amount of contributions which can be split, I request the Trustee split the maximum amount of splittable contributions in favour of my spouse.

I understand that I may request up to date information on the value of my benefit in the Fund and the effect this contribution split will have on my benefit.

I confirm that I have read, understood and accept the *Privacy information and consents* overleaf.

I declare that the information supplied is correct and request that Maritime Super amend its records accordingly.

Member's Signature

Date

Using this form

You can use this form to split contributions with your spouse, including an opposite or same-sex de facto partner (with whom you live on a genuine domestic basis in a relationship as a couple or your relationship is registered on a State or Territory relationship register).

If you are a Defined Benefits member, you may **only** split contributions made to your voluntary contribution account, unless you have permanently left the maritime industry.

Need help?

If you have any questions about contribution splitting or would like to discuss establishing a superannuation membership for your spouse or partner to receive the split contributions, please contact Member Services on 1800 757 607.

Privacy information and consents

Personal information is collected from or in respect of you to enable Maritime Super to administer your (or your spouse's) benefits. If you do not supply the required information, we may not be able to do so (and may be unable to action your requests). We may disclose this personal information to a number of parties, such as the administrator of the Fund, your employer(s) (if you are a member), Maritime Super's professional advisers, insurer(s) and service providers, as required by law and/or as authorised by you. You may be entitled to gain access to personal information we may have on file in respect of you. If you wish to obtain access or have a complaint, please contact Member Services on 1800 757 607.