

# Contribution splitting request

Complete this form to split concessional contributions with your spouse.



## Providing proof of identity

You are required to provide certified copies of your ID documents if your spouse's account is held in another super fund - if your spouse is a Maritime Super member, you do not need to do this. To learn more about how to certify your ID documents, refer to the *Providing proof of identity fact sheet*.

## Your personal details

Member Number	Surname	Given Names	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="/ /"/>
Postal address			
<input type="text"/>			
Email address			Daytime phone number/Mobile number
<input type="text"/>			<input type="text"/>

## Contribution details

Financial year of contributions to be split 01/07/  to 30/06/

You can usually 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.

If you are a Defined Benefit member, you can only split contributions to your voluntary contribution account.

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

Voluntary employer contributions

Salary sacrifice contributions

Personal contributions claimed as a tax deduction

Allocated surplus

How much of these contributions do you wish 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 dollar amount of contributions

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

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 when you access benefits following retirement from the maritime industry. However, if you transfer benefits from your Core Accumulation or Benchmark Salary account to another fund before retiring from the maritime industry, you will waive your rights to any minimum protected benefit (now and in the future).

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

No

Yes  Tick the appropriate box below - if you do not tick a box, you will waive your rights to a minimum benefit.

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

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

I agree to have my minimum protected benefit calculated at the time of purchasing my WISP and agree that I will not be entitled to a minimum protected benefit again - complete the *Access Benchmark Salary or Core Accumulation Account form* available from our website or by calling Member Services and attach it to this form.

### Details of person (spouse) receiving the contribution

Surname  Given names

Postal address

Date of birth  /  /  Daytime phone number/mobile number  Email address

### Member's declaration

I request the Trustee split the contributions, as detailed overleaf, in favour of my spouse. I confirm that the person nominated is my legal spouse or de facto partner. I understand that I cannot make another request to split contributions for the noted financial year.

If the contribution amount I have requested to be split exceeds the maximum amount that can be split, I request the Trustee to 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.

(Tick if applicable) I have attached certified copies of my ID documents (only required if your spouse is not a Maritime Super member).

Signature

Date  /  /

### Spouse's declaration and payment instructions (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 my preservation age; OR
- I am between my preservation age and 65 years and I have not retired\*

\* '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.

Maritime Super Member Number

OR

If you are not a Maritime Super member, provide details of the complying superannuation fund into which you would like the contributions transferred:

Fund name<sup>^</sup>  Is this your SMSF?<sup>^</sup>  No  Yes

Fund phone number (for SMSF transfers)<sup>^</sup>

Australian Business Number (ABN)

Unique Super Identifier

Membership number (not required for SMSF transfers)

I confirm that the information provided is correct and confirm that I have read, understood and accept the privacy information and consents below.

Signature

Date  /  /

In order to verify your bank details for payment, please provide a photocopy of a bank statement that shows the SMSF's account name and number. Please note that payment will be made by cheque if a bank statement is not provided, or if the bank account is not in the name of the SMSF.

Provide the banking details for your SMSF

BSB

Account number

Account name/s

Return this completed form, along with certified copies of your ID documents (if required) by post to: Maritime Super, Locked Bag 2001, QVB Post Office NSW 1230

Privacy statement: Maritime Super collects your personal information to effectively administer your superannuation account and respond to your requests. The Fund takes all reasonable steps to protect your privacy and the confidentiality of your personal information but may disclose your personal information to other parties, such as the Administrator, insurers, service providers, or as required by law. The Trustee and Maritime Financial Services Pty Limited (MFS) (the Administrator) are bound by the 'Australian Privacy Principles' prescribed in the Privacy Act 1988 which regulate how the Trustee and MFS may collect, use and disclose members' details. Information about how Maritime Super uses and discloses the personal information that you provide is contained in the Trustee's Privacy Policy. To access this Policy visit the website at [www.maritimesuper.com.au](http://www.maritimesuper.com.au) or to access your personal details call Member Services on 1800 757 607.