

Contribution Splitting Form

Complete this form to split your super contributions with your spouse.

Note: Both you and your spouse will need to provide certified proof of identification with this form (see 'Further information').

Please print clearly using an in boxes where required.

Step 1 | Your details

Please read our Personal Information Collection Statement at lucrf.com.au/privacy.

LUCRF Super member number

(please call **1300 130 780** if you don't know your member number)

Title

 Mr Mrs Miss Ms Other (please specify)

First name(s)

Last name

Date of birth

 / /

Gender

 Male Female Other

Step 2 | Your tax file number (TFN)

We're authorised under legislation to collect, use and disclose your TFN. Where provided, it will be kept confidential and used only for lawful purposes (which may change in the future). It's not an offence if you choose not to provide your TFN. However, giving us your TFN means that we can accept all types of contributions to your account. You also won't be subject to additional tax as a result of failing to provide your TFN and it'll be easier for you to find other super accounts in your name. If we transfer your super to another fund, we may disclose your TFN to the other fund unless you send us a request in writing not to disclose it.

I have already provided my TFN.

OR

I am aware I do not have to provide my TFN, but by providing it I understand LUCRF Super will only use it for legal purposes.

I choose to provide my TFN and declare it is:

Step 3 | Your spouse's details

Does your spouse have a LUCRF Super account?

Yes Please complete Steps 3a and 3b.

No We will open an account on their behalf. Please complete Steps 3a, 3b and 3c.

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Step 3 | Your spouse's details (continued)

Step 3a

Your spouse's LUCRF Super member number (if they're already a LUCRF Super member)

Title

Mr Mrs Miss Ms Other (please specify)

First name(s)

Last name

Date of birth

/ /

Gender

Male Female Other

Step 3b – Your spouse's tax file number (TFN)

We're authorised under superannuation legislation to ask for your spouse's TFN. We use their TFN to administer superannuation accounts and superannuation-related transactions. We may disclose it to the Australian Taxation Office and other superannuation funds.

It is not an offence if your spouse chooses not to provide their TFN. However, if they do not provide their TFN, we may not be able to process certain transactions or we may need to apply withholding tax to payments made to them. If we transfer their super to another fund, we may disclose their TFN to the other fund unless they send us a request in writing not to disclose it.

My spouse has already provided their TFN.

OR

My spouse is aware that they do not have to provide their TFN, but by providing it they understand LUCRF Super will only use it for legal purposes.

My spouse chooses to provide their TFN and declares it is:

Step 3c – Your spouse's new account details

Only complete this step if your spouse is **not** a current LUCRF Super member. You must also provide an originally certified copy of their proof of identification (see 'Further information').

Please note: Your spouse's new account will be set up as Personal Plan account, which means your spouse will not receive default Death & Total and Permanent Disablement (TPD) insurance cover. If your spouse is not self-employed and would like their employer to pay their Superannuation Guarantee (SG) contributions into their new account, tick the box below and we'll be in touch to complete this step.

My spouse would like his/her employer to pay SG contributions into this account. I confirm that my spouse is not self-employed.

Postal address

Unit/Street/PO Box number

Street name

Suburb/City/Town

State

Postcode

Contact details

Email address


Home phone

()

Work phone

()

Mobile

Continued over the page 

Step 3 | Your spouse's details (continued)

Your spouse's signature

- I declare that at the date of this application I am the spouse of the person detailed in Step 1 and I am either:
 - under preservation age, **or**
 - between preservation age and 64 and not retired (preservation age is 57 to 60 depending on your date of birth).
- I authorise my spouse to provide LUCRF Super with the information contained in this application and declare that all information given in this application is true and correct.
- If I am not currently a LUCRF Super member:
 - I agree that I wish to apply to open a Personal Plan account with LUCRF Super and authorise my spouse to apply on my behalf.
 - I understand that I will not receive default Death & TPD insurance with a new Personal Plan account, but may apply for insurance cover at any time.
 - I have read and understood the information contained in the Super Member Guide – Product Disclosure Statement (PDS), the Super Member Guide – Additional Information, the Fees and Costs booklet, the Insurance Guide and the Investments Guide.
 - I acknowledge that my Personal Plan account balance will be invested in the default MySuper Balanced investment option, unless I instruct otherwise, which is subject to risk of loss due to market fluctuations.
- I consent to the collection, use and disclosure of my personal information in accordance with the LUCRF Super Personal Information Collection statement and the Privacy Policy available at lucrf.com.au/privacy or by calling **1300 130 780**.
- I have read the information about the collection and use of tax file numbers in Step 3b.
- I understand that the document details I provide as evidence of my identity may be checked with the relevant government agency via the Document Verification Service (more information can be found at dvs.gov.au).

Signature



Date

/ /

Investment options

If your spouse is **not** a current LUCRF Super member, their account balance will be invested in our default MySuper Balanced option unless they instruct us otherwise. They can change their investment option by logging in to Members Online. If they've supplied an email address at Step 3c, they'll be given Members Online access. Once they've registered, they can change their investment option – and any other details – at any time.

Step 4 | Contribution splitting details

You can split up to 85% of your concessional (before-tax) contributions with your spouse once a year up to the concessional contributions cap. Applications to split your super with your spouse can only be made in the financial year after the contributions were made. Contributions splitting does not reduce the amount counted towards your concessional contributions cap.

You can apply to split contributions in the current financial year, but only if you close your account (e.g. it's rolled over, transferred or withdrawn as a lump sum benefit or a combination of these) before the end of the financial year. We must receive your application to split your super *before* you close your account.

Which financial year would you like to split contributions from and how much would you like to split? Please select one of the options below.

This must be either the previous financial year, or the current financial year.

Previous financial year: / / Amount \$ OR % percentage

Current financial year:
(only available if you're closing your account) / / Amount \$ OR % percentage

Step 5 | Sign and date this form

- I request that you split the contributions detailed in Step 4 to my spouse's super account (as detailed in Step 3).
- I declare that the information provided on this form is correct.
- I consent to the collection, use and disclosure of my personal information in accordance with the LUCRF Super Personal Information Collection statement and the Privacy Policy available at lucrf.com.au/privacy or by calling **1300 130 780**.
- I understand that the document details I provide as evidence of my identity may be checked with the relevant government agency via the Document Verification Service (more information can be found at dvs.gov.au).
- I declare that at the date of this application, the person detailed in Step 3 is my spouse.

Signature



Date

D	D	/	M	M	/	Y	Y	Y	Y
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Checklist

Before you send this form to us, make sure you have:

- completed all relevant steps
- you and your spouse have signed and dated this form
- included proof of identification.

Send this form to:

LUCRF Super
PO Box 211
North Melbourne VIC 3051

Further information | Proof of identification

 **IMPORTANT: Your proof of ID must be certified and dated within 12 months of the date we receive it.**

What is a certified document?


It's a 'true copy' of an original document, sighted and signed by an authorised individual.

Who can certify a document?

Only certain individuals are authorised to certify copies of original documents. These include (but are not limited to):

- a pharmacist
- a registered medical practitioner
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a permanent employee of Australia Post with two or more years of continuous service
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL) with two or more years of continuous service.

The individual must view both the original and the copy to make sure that both documents are identical. They must then write or stamp "Certified to be a true copy of the original seen by me" on each of the copies, followed by their signature, printed name, qualifications and date.

 **For further details on providing proof of identification**, including what to do if you've changed your name or you're currently overseas, call us on **1300 130 780** or refer to our 'How to provide proof of identification' fact sheet available on our website.

What certified documents are accepted?

Accepted documents include the following:


1. One of these government-issued photographic ID documents:
 - current Australian driver licence
 - Australian passport (current or that has not been expired for more than two years)
 - current foreign passport
 - other current Australian government-issued photographic ID (such as a proof of age card or Australian tertiary institution student card).

OR

2. One of these government-issued non-photographic ID documents:
 - birth certificate or birth extract
 - citizenship certificate
 - current foreign driver licence
 - current Centrelink pension card.

And one of these documents showing your address:

- utility bill (less than 3 months old)
- local government rates notice (less than 3 months old)
- government benefits notice (less than 12 months old)
- tax assessment notice (less than 12 months old).

 If you need any help completing this form, please call us on **1300 130 780** or email mypartner@lucrf.com.au.