Prime Super contribution splitting form

Please use this form if you wish to split your superannuation contributions with your spouse.
Your spouse does not have to be a member of Prime Super to receive your contributions.
Please complete in pen using **BLOCK** letters. Print 'X' to mark boxes where applicable.
Please provide as much information as possible.

Part of your Community

The instructions you provide in this form will apply to contributions made in the previous financial year.

At no time can you apply to split contributions made to the Fund prior to the previous financial year.

You are limited to one splitting application each financial year and the amount to be split will be limited to the amount of your account balance in the Fund.

Under Government legislation you are able to split the following:

Concessional (before-tax) contributions
- 85% of Superannuation Guarantee (SG) contributions; and
- 85% of any salary sacrifice contributions.

Please note: You cannot split non-concessional (after-tax) contributions.

There is no fee for this transaction if you split contributions to your spouse's account within Prime Super. However, if you split contributions to another fund, you will be charged a payment fee for each splitting payment. Please see the *Prime Super Short-Form Product Disclosure Statement – Superannuation* for details.

SECTION 1 – PERSONAL DETAILS

Member Number

Date of Birth (DDMMYYYY)

Tax File Number (TFN)

Surname

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Dr

Given Names

Gender ☐ Male ☐ Female

Residential Address

Suburb/City/Town

State

Postcode

Phone Number (BH)

Phone Number (AH)

Mobile Number

Email

Name of Employer

Occupation

PSUP33_1211

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SECTION 2 – YOUR SPOUSE'S DETAILS

Member Number (if applicable)

Date of Birth (DDMMYYYY)

Tax File Number (TFN)

Surname

Title

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Dr

Given Names

Gender

☐ Male ☐ Female

Residential Address

Suburb/City/Town

State

Postcode

Phone Number (BH)

Phone Number (AH)

Mobile Number

Email

Please provide the following information if your spouse is not a member of Prime Super

Fund contact details

Cheque payable to

Australian Business Number (ABN)

Superannuation Fund Number (SFN)

Spouse's member number in Fund

Superannuation Product Identification Number (SPIN)

This information can generally be found on benefit statements received from the fund or by calling their customer service centre directly.

SECTION 3 – CONTRIBUTION SPLITTING DETAILS

You can split contributions made in the previous financial year (no earlier) or the current financial year if you are leaving the Fund. In the case of the latter, you must provide a completed *Benefit payment form* to the Fund.

Financial year ending: 3 0 J U N E 2 0 ☐ ☐

Contributions to be split (nominated amount or percentage split): $ ☐☐☐☐☐☐☐ OR ☐☐☐%

Note: If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the Trustee notice of your intention to claim a deduction before you lodge this form.

SECTION 4 – MEMBER REQUEST AND DECLARATION

I request that Prime Super split the contributions detailed in Section 3 to my spouse's superannuation account as detailed in Section 2.

I declare that:

- the information provided in this form is correct; and
- a family law splitting or flagging order does not apply to my account in Prime Super.

Full Name

Member Signature

Date (DDMMYYYY)

SECTION 5 – SPOUSE DECLARATION

As the receiving spouse, please provide your Tax File Number (TFN).
Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The Trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the Trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account(s);
- the tax on contributions to your superannuation account(s) will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Your TFN will otherwise remain confidential.

Insert your nine digit TFN here: | | | | | | | | | |

I declare that at the date of this application I am the spouse of the applicant and I am:

- less than my preservation age; OR
- between my preservation age and 65 years and have not retired from the workforce.

Your preservation age is as follows:	
Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 1 July 1964	60

Full Name

Spouse's Signature

Date (DDMMYYYY)

WHERE TO SEND THIS FORM

Once completed please return this form to us via mail, fax or email.

Mail Prime Super
Locked Bag 5103
Parramatta NSW 2124

Freecall 1800 675 839
Fax 1800 023 662
Email administration@primesuper.com.au

If you have any questions about this form or Prime Super please call us on **1800 675 839** (8.00am to 8.00pm Monday-Friday Sydney time).