



PERSONAL AND SPOUSE CONTRIBUTION FORM

Complete this form if you are intending to make a personal contribution into your account, or into your spouse's Future Super account.

You can find detailed information about Future Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide, Financial Services Guide and Privacy Policy, all of which can be obtained from www.myfuturesuper.com.au or on request by phoning **1300 658 422**.

This form may be posted to **Future Super PO Box 1282, Albury, NSW 2640** or scanned and emailed to info@myfuturesuper.com.au.

Section 1 Personal details

Given Name(s)	<input type="text"/>
Surname	<input type="text"/>
Member number	<input type="text"/>
Date of Birth	<input type="text"/>
Phone number	<input type="text"/>
Email address*	<input type="text"/>

* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can elect to receive communications by post at any time by contacting Future Super on **1300 658 422** or via email at info@myfuturesuper.com.au or in writing at **PO Box 1282, Albury, NSW 2640**.

Section 2 Eligibility to contribute

To be able to make voluntary personal contributions to your account, or the account of your spouse, you must meet one of the eligibility criteria under superannuation legislation. The Government restricts the amount that you can contribute to your super account. If you go over these limits, additional taxes may apply. For more information, see the discussion of contributions caps in the Future Super Additional Information Booklet available at www.myfuturesuper.com.au or by contacting us on **1300 658 422** or via email at info@myfuturesuper.com.au or refer to www.ato.gov.au.

To confirm that you are eligible to contribute, please mark the box below that describes your current circumstances. Please contact us immediately if your circumstances change.

1. I am contributing to my own account and:

- I am under the age of 67.
- I have reached age 67 but I am not yet 75, and have met the Superannuation Work Test*, which means that I have been gainfully employed for at least 40 hours in 30 consecutive days in the current financial year.

I have reached age 67 but am not yet 75, and I am relying on the Superannuation Work Test Exemption** to make voluntary superannuation contributions in my first income year after retirement. I had a Total Superannuation Balance of less than \$300,000 at 30 June of the previous financial year and I have not relied on this exemption previously.

2. I am contributing to my spouse's account and my spouse:

is under the age of 67.

has reached age 67 but is not yet 75 and has met the Superannuation Work Test* of being gainfully employed for at least 40 hours in 30 consecutive days in the current financial year.

has reached age 67 but is not yet 75, and is relying on the Superannuation Work Test Exemption** to receive a voluntary superannuation contribution in their first income year after retirement. My spouse had a Total Superannuation Balance of less than \$300,000 at 30 June of the previous financial year and has not relied on this exemption previously.

* The Work Test must be satisfied for each financial year that a personal contribution is made by you or on your behalf, unless you are relying on the Work Test Exemption.

** The Work Test Exemption is an exemption from the Work Test for voluntary superannuation contributions made by you or on your behalf in your first income year after retirement.

Section 3 Contribution Type

Please select the type of contribution you are intending to make:

Personal concessional contribution¹

Personal (non-concessional) contribution

Downsizer contribution

Please complete the ATO's **Downsizer Contribution into Superannuation Form**. Download this form from the ATO's website at www.ato.gov.au and **attach a completed form to this application**.

Spouse contribution

If you are making a spouse contribution, please provide the personal details of the spouse receiving the contribution.

Given Name(s)

Surname

Member Number

Date of Birth

Mobile Phone Number

Email Address

Residential
Address

¹ All personal contributions are made from your after-tax salary. If you want to make your personal contribution concessional, please carefully read and complete Section 4 of this form. If you intend to make a personal concessional contribution and do not satisfy all the requirements, the contribution will be treated as non-concessional and may be subject to extra tax.

City

State

Postcode

Section 4 Tax Deduction

This section should only be completed if you have elected that you want to make a personal concessional contribution in section 3 above.

All personal contributions are made from your after-tax salary; however you may be eligible to claim a tax deduction in relation to personal contributions. If you do so, the contribution will be treated as a concessional contribution.

In addition to completing this form, you must submit a valid Notice of Intent to the Trustee within the prescribed timeframe. Eligibility rules and contributions caps apply, and if these are not satisfied your contribution will be treated as non-concessional and may be subject to extra tax. For more information, see: <https://www.ato.gov.au/Individuals/Super/In-detail/Growing-your-super/Claiming-deductions-for-personal-super-contributions/> (where you can also find a template Notice of Intent). You should also speak to your accountant and/or tax adviser.

Will you be claiming a tax deduction for this contribution? Yes No

Section 5 Contribution Details

Contribution Type: One Off Recurring

Payment Amount

\$

Reference Identifier

Date of Payment

Payment Frequency

Section 6 Payment Method

Payment Method: BPay Electronic Funds Transfer

Our account details are:

Future Super Application Account

BSB: 182 512

ACCOUNT: 965491681

Please enter your Future Super Member Number as the reference identifier.

Contributions to Future Super made in cash or by cheque will not be accepted.

Section 7 Declaration and Signature

By completing this form, I declare that:

- All the details I have provided in this form are true and correct.
- I have made an informed decision because I have read and understood the PDS and AIB to which this personal contribution applies.
- I am eligible to make this contribution to my account or to the account of my spouse.
- I am married to my spouse or live with them on a genuine domestic basis.
- My spouse and I are Australian residents for tax purposes.
- I accept that this contribution will remain preserved in my account, or the account of my spouse, until a condition of release occurs, such as retirement after reaching preservation age.
- I understand that if the contribution exceeds a contribution cap, I may be subject to additional tax on the excess amount.
- I consent to my personal information being used for the purpose of making this transaction.
- I have read and understood the Privacy Statement and understand how Future Super will use my personal information.

x

.....
Signature

...../...../.....

Date

.....
Print Name

PRIVACY STATEMENT: By signing this form you consent to Future Super collecting and using your personal information to manage your superannuation account and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit www.myfuturesuper.com.au or phone **1300 658 422**.
