

CATHOLIC SUPER

Contributions splitting application



Address: GPO Box 2163 Melbourne VIC 3001

Phone: 1300 550 273 **Fax:** (03) 9648 4720 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use BLOCK letters and black ink when completing this form. This request will be invalid if unsigned.

Use this form to transfer contributions made to your Catholic Super account into your spouse's super. Before completing this application, read the Contributions splitting brochure available at www.csf.com.au or by calling 1300 550 273. (You are required to satisfy the 'Proof of Identity Requirements' set out over the page so that we are able to verify your identity).

Section 1: Your details

Catholic Super Member Number	Date of Birth (DD/MM/YYYY)	Sex
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (Business hours)	(Mobile)	
<input type="text"/>	<input type="text"/>	
Email		
<input type="text"/>		

Section 2: Receiving spouse details

Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Date of Birth (DD/MM/YYYY)	Sex	
<input type="text"/>	<input type="text"/>	
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
I agree to provide my Tax File Number:	<input type="checkbox"/> YES <input type="checkbox"/> NO	Tax File Number <input type="text"/>
Providing your Tax File Number (TFN)		
It is not compulsory to provide Catholic Super with your TFN, however if you do not, you may pay more tax than you have to. We are also unable to accept personal member contributions if we do not have your TFN. For details regarding TFNs, refer to our Product Disclosure Statement on our website, or call 1300 550 273 to request a copy.		

Section 3: Receiving spouse fund details

Is your spouse a Catholic Super member?	If no, and your spouse would like to be a member of Catholic Super, call us on 1300 550 273 for a Membership application form. Your spouse must have a superannuation account in place before you lodge the Contributions splitting application.	OR
If yes, your spouse's member number		
<input type="text"/>		

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Trustee: CSF Pty Limited ACN 006 169 286 ABN 50 237 896 957 AFSL 246664 Spin Number CSF0100AU RSE L0000307 RSE R1000597
Registered Office: 535 Bourke Street, Melbourne VIC 3000

Section 3: Receiving spouse fund details (cont.)

Receiving spouse's fund other than Catholic Super

Name of fund

Policy / Member number

The fund's Australian business number (ABN)

The fund's superannuation fund number (SFN)

Superannuation product identification number (SPIN)

Street Number / PO Box

Street Name

Suburb / Town

State

Postcode

Section 4: Contribution splitting details

Before 1 July 2007, a wide variety of contributions could be split with a spouse, including employer contributions, personal contributions (where you are self-employed), personal contributions out of your after-tax income, and super co-contributions.

From 1 July 2007, only concessional contributions can be split.

Financial year ended (YYYY)

For the financial year ended 30 June 2007, splitting applies to contributions made between 1 July 2006 and 30 June 2007.

Taxed contributions to be split

eg. employer and salary sacrifice contributions. You can split up to 85% of these contributions. From 6 April 2007, only concessional taxed contributions can be split.

Untaxed contributions to be split

(only untaxed contributions received prior to 6 April 2007 can be split)

eg. member contributions, Government co-contributions. You can split up to 100% of these contributions.

Section 5: Declaration

Your request and declaration

- I request that you split the contributions shown in Contributions splitting details to my spouse's superannuation account as shown in Receiving spouse fund details.
- I understand that, a contributions splitting fee of \$60.50 will be deducted from my account in Catholic Super.
- I understand that I must maintain a minimum balance of \$5,000 in my Catholic Super account.
- I understand that all split contributions to my spouse's account will be preserved.
- I declare that the information provided on this form is correct.

Your signature

Date (DD/MM/YYYY)

Your spouse's declaration

- I declare that at the date of this application I am the spouse (married or de facto of the opposite sex) of the person making this application.
- I declare that I am aged
 - less than my preservation age, OR
 - between my preservation age and 65 years and have not retired from the workforce.
- I declare that the information provided on this form is correct.

Your spouse's signature

Date (DD/MM/YYYY)

Section 5: Declaration *(cont.)*

Personal information

The personal information that Catholic Super collects is used to:

- process your application and requests,
- administer your super account and provide you with benefits and options,
- correspond with you in relation to your super account, benefits and options,
- conduct research about how to improve Catholic Super's service and products, and
- cross match your personal details with other superannuation funds to help locate any other superannuation accounts in your name.

If you choose not to give us your personal information, or provide us with incomplete or inaccurate personal information, we may not be able to provide you with all the benefits of Catholic Super. Unless required or authorised by law, we will only provide your personal information to authorised service providers who use the information to administer your account and provide services to you, such as to an insurance company that provides you with insurance cover. You are able to gain access to your personal information by asking for it. If you would like to request access to the personal information we hold about you, or want further information on how we handle personal information, please contact us.

Proof of Identity Requirements

For payments less than \$10,000, you must provide Catholic Super with a certified copy of one document (photo ID) from the following:

- Australian Drivers Licence, OR Current Passport, OR Any photo ID issued by a Government Agency*

For payments of \$10,000 or more, you must provide Catholic Super with either

1. certified copies of any two documents (photo ID) from the following:
 - Australian Drivers Licence, OR Current Passport, OR Birth Certificate, OR Any photo ID issued by a Government Agency* **OR**
2. If you are unable to provide the documents stated in 1 above, you will need to satisfy the "100 point check" requirement**

* *Other forms of photo identification issued by a government authority (other than an Australian driver's licence or current passport) would include other acceptable Government issued licences including boat, gun, or pilot, as well as overseas or international drivers licences.*

** *Call Catholic Super on 1300 550 273 if you require further guidance on this requirement.*

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