

# APPLICATION TO SPLIT ELIGIBLE CONTRIBUTIONS

**SUPER SA**

contributing to your future

Please complete this form in **BLOCK LETTERS** using a **BLACK PEN** and return the signed original to Super SA.

## 1. Contributing Member Personal Details

**Account ID**

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 Mr  Ms  Miss  Mrs  Dr  Prof

Surname

Given name(s)

Residential address

Postcode

Postal address (if different from above)

Postcode

Date of birth / /

Email\*

Telephone\* (M)

(W)

(H)

Name of employer

Employee number

\*By providing your email address and/or telephone number(s) you are agreeing to receive, from Super SA, or an organisation on behalf of Super SA, marketing communications including newsletters, announcements, invitations or surveys. You may opt out of these marketing communications at any time by updating your communication preferences in our online member portal or by contacting Super SA. If you opt out of marketing communications, you will still receive any important account information from us.

**Contact Us****In person:**

Ground floor, 151 Pirie Street  
Adelaide SA 5000  
(Enter from Pulteney Street)

**Postal:** GPO Box 48, Adelaide, SA 5001**Call:** (08) 8207 2094 or 1300 369 315**Website:** www.supersa.sa.gov.au**<sup>1</sup> Putative spouse**

For a partner to be recognised as a putative spouse of a member, they need to satisfy the requirements under the *Southern State Superannuation Act 2009* (conditions apply).

In general terms, the person must have been living with their partner as husband and wife de facto (or with the distinguishing characteristics of a married couple in the case of same sex couples) and have either:

- lived continuously with the member for the preceding three years, or
- lived with the member for an aggregate period of three out of the four preceding years, or
- had a child who has been born of the relationship of whom both are the parents.

A person will also be recognised as a putative spouse of the member if in a Registered Relationship with the member (within the meaning of the *Relationships Register Act 2016*).

You need to complete this form for each financial year that you would like to split super contributions with your spouse (including a putative spouse<sup>1</sup>).

**You can only make one contribution splitting application each financial year.**

**Checklist**

Please remember that before Super SA is able to process your application you and your spouse need to complete all sections on this form. If you do not provide the requested information, there will be a delay in processing your application.

- I have completed my personal details (section 1).
- I have provided my contribution splitting details (section 2).
- I have completed the member declaration (section 3).
- My spouse has completed their personal details (section 4).
- My spouse has supplied Super SA with their Tax File Number (section 5).
- My spouse has provided their investment choice (section 6).
- My spouse has completed the spouse declaration (section 7).

## 2. Member contribution splitting details

I would like the following contributions to be split into my spouse's account:

 Contributions for the current financial year

Note: This option is only available if you are closing your account. You will also need to complete an *Application for Payment of Entitlement* form and return it to Super SA with this form.

Or

 Contributions for the previous year.

Contribution split amount \$ \_\_\_\_\_ or \_\_\_\_\_ %

**Please note:**

- A minimum \$50 splitting amount applies
- Your Triple S account balance must remain above \$1,000 after each split
- The maximum amount of contributions that can be split in respect of contributions made in 2019/20 and future years is equal to the concessional contribution cap.



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### 3. Member Declaration

- I declare that the information provided on this form is true and correct.
- I understand that the amount specified in section 2 of this contribution splitting application will be transferred from my Triple S account into my spouse's account and that this cannot be reversed.

Signature: **X**

Date: / /

### 4. Receiving Spouse Personal Details

Mr  Ms  Miss  Mrs  Dr  Prof

Surname

Given name(s)

Residential address

Postcode

Postal address (if different from above)

Postcode

Date of birth / /

Email

Telephone (M) (W) (H)

Do you have an existing active or preserved account in Triple S?  Yes  No

Account ID

Do you have an existing Spouse Account?  Yes  No

Account ID

If you have answered no to both of these questions, a Spouse Account will be set up in your name using the information provided above.

### 5. Receiving spouse tax file number

Tax file number

Providing your TFN will ensure that your entitlement is taxed concessionally. However, if you choose not to provide your TFN, part of your entitlement will be taxed at the highest marginal rate.

Declining to provide your TFN is not an offence.

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Please complete this form in **BLOCK LETTERS** using a **BLACK PEN** and return the signed original to Super SA.



You must complete this section.

Your super can be invested between any number of the available investment options providing the total is equal to 100%. You can nominate different combinations of investment options for your current account balance and your future contributions. Please use whole percentages only. Please sign the member declaration on the next page.

## 6. Receiving spouse investment instructions and investment choice

Please invest this contribution according to my current nominated investment preference (this can only be selected if you have an existing account)

Or

Invest my future contributions, including rollovers and this eligible contribution, as indicated below:

Option	Percentage allocation
High Growth	%
Socially Responsible	%
Growth	%
Balanced	%
Moderate	%
Conservative	%
Capital Defensive	%
Cash	%
<b>Total (must equal)</b>	<b>=100%</b>

If you have an existing account and wish to change the way your current account balance is invested, please complete an investment switch. You can do this online in the member portal or by completing an Investment Choice form and returning it to Super SA.

## 7. Receiving spouse declaration

I declare that at the date of this application I am the spouse of the applicant as defined previously on page 1, and

I am below my preservation age (see table to the left)

Or

I am between my preservation age and age 65 and have not permanently retired.

**Note: you must tick one of the boxes above.**

Signature: **X**

Date: / /

Preservation table

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
After 30 June 1964	60

### Contribution splitting caps

For contributions received in the 2018/19 financial year, there is no limit on the amount that you can split to your spouse. For contributions received in the 2019/20 financial year, and future years, the maximum amount of contributions that can be split is equal to the concessional contribution cap.

You should seek financial advice regarding your contribution and contribution splitting strategy.