

## Important Information

# Making Voluntary Contributions to Your Super Account – Personal and Spouse Contributions

### Check that you're eligible

#### Personal contributions

You can make personal contributions (after-tax, including contributions for which you intend to claim a tax deduction) if you're less than 65, regardless of your employment status. If you're aged 65 or older but under 75, you can only make personal contributions if you've worked at least 40 hours over 30 consecutive days in the financial year the contribution is being made (known as the Work Test). We cannot accept personal contributions if you're aged 75 or older.

#### Spouse contributions

We can accept spouse contributions into your EISS Super account on your behalf provided you meet the following conditions:

- You must be living with your spouse and you are both Australian residents; and
- You're under age 70 and meeting the relevant Work Test (note: we cannot accept spouse contributions on your behalf if you are aged 70 or older).

#### Contribution caps and limits

The Government has imposed contribution caps to contributions you make to your super within a financial year. You may need to pay extra tax on amounts in excess of these caps. If you want to avoid excess contributions, it's your responsibility to make sure that the total amount of contributions made to your EISS Super account – and to any other accounts you hold in other super funds – don't exceed the limit.

For more information please refer to our 'Contribution Caps' fact sheet at [eisuper.com.au/factsheets](https://eisuper.com.au/factsheets).

### Provide your Tax File Number (TFN)

You must have provided your TFN to EISS Super before you can make after-tax contributions. If your TFN hasn't been provided, this contribution cannot be accepted and will be returned to you.

If you're uncertain as to whether or not you have provided your TFN, you can check your account at [eisuper.com.au/login](https://eisuper.com.au/login) or call us on 1300 369 901.

### Confirm how your contribution will be invested

Contributions made to your EISS Super account will be invested as per your future contributions strategy. If you haven't chosen an investment strategy, the contribution will be invested in the MySuper Conservative Balanced option, our default investment option. You can change your future contributions strategy at any time by logging into your account at [eisuper.com.au/login](https://eisuper.com.au/login) or by calling us on 1300 369 901.

### Make your contribution

**You don't need to complete this form, if you or your spouse make a contribution using BPAY®.**

The quickest and easiest way for you or your spouse to make a voluntary contribution to your EISS Super account is to use BPAY®. BPAY® allows you to make a contribution by phone or internet from your phone or internet banking account at a time convenient to you.

If you or your spouse prefer to make a contribution via cheque, complete this form and attach your cheque. Contributions received by EISS Super via cheque may take up to three working days to process following receipt of the cheque and your completed form.

You can find details about how to make a contribution via BPAY®, including the Biller Code and your personal Reference Number, by logging into your account at [eisuper.com.au/login](https://eisuper.com.au/login) and heading to the BPAY® section or you can call us.

## Claiming a tax deduction for personal contributions

Note: If you wish to claim a deduction, tax deduction on your personal contribution, please complete the 'Notice of intent to claim or vary a deduction for personal contributions' form, available on [eisuper.com.au/forms](https://eisuper.com.au/forms) or by calling us on 1300 369 901.

You may be eligible to claim a tax deduction for your personal contributions if:

- you give a valid notice to EISS Super of your intent to claim a deduction and EISS Super acknowledges your notice, and
- the notice is given to EISS Super by the earlier of:
  - the time you lodge your income tax return for the year; or
  - the end of the financial year following the year the contribution was made.

A notice will not be valid and you won't be able to claim if:

- the notice does not meet the Australian Taxation Office (ATO) requirements;
- you have left EISS Super;
- the Trustee no longer holds that contribution for you (i.e. if you have made a partial withdrawal from your EISS Super account, you may only be able to claim a deduction on part of your contribution); or
- the Trustee has started to pay an income stream or pension to you.

EISS Super

# Making a Personal or Spouse Contribution

## About this form

**If you or your spouse make a contribution using BPAY® you do not need to complete this form.**

You should complete this form if you or your spouse would prefer to make a contribution via cheque. You'll need to complete this form each time you or your spouse contribute by cheque.

Contributions received by EISS Super via cheque may take up to three (3) working days to process following receipt of the cheque and your completed form.

## We're here to help

If you need assistance completing this form, you can call us on 1300 369 901, Monday to Friday from 8am to 8pm (AEST).

Please complete all sections of this form as applicable, sign and return the completed form to:  
EISS Super GPO Box 7039, Sydney, NSW 2001.

## Step 1. Your personal details (EISS Super member)

This section should be completed by the member receiving the contribution.

We will use this information to verify your membership with EISS Super.

Member Number

Account Number

Mr / Mrs / Ms / Miss / Other

Given name(s)

Surname

Date of birth   /   /

If we have any questions about this form we will contact you on the details you provide below:

Telephone

Mobile

Email

You can change your personal details online by logging into your account at [eisuper.com.au/login](https://eisuper.com.au/login).

## Step 2. Contribution type

You can make voluntary personal contributions to your EISS Super account, or your spouse can contribute to your EISS Super account on your behalf.

Select one option ✓

- Personal, after-tax contribution - **go to Step 4**
- Spouse contribution - **go to Step 3**

## Step 3. Contributing spouse details

Mr / Mrs / Ms / Miss / Other

Date of birth  /  /

Given name(s)

Surname

## Step 4. Confirm your employment status (EISS Super member)

**This section should be completed by the member receiving the contribution if they are aged 65 years or over.**

You must be gainfully employed on at least a part-time basis during the financial year in which the contribution is made. Gainfully employed means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment. On at least a part-time basis means you worked at least 40 hours in a period of not more than 30 consecutive days in that financial year.

- I have been gainfully employed for a minimum of 40 hours over 30 consecutive days this financial year with one or more employers.

## Step 5. Provide your Tax File Number (TFN)

You must have provided your TFN to EISS Super before you can make after-tax contributions.

If your TFN hasn't been provided, this contribution cannot be accepted and will be returned to you.

EISS Super might already hold your TFN. If you're not sure if you have previously provided it, you can choose to do so now. Alternatively, you can check your account at [eisuper.com.au/login](https://eisuper.com.au/login) or by calling us on 1300 369 901.

Your Tax File Number (TFN)

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## Step 6. Make a contribution

Provide the details of your personal or spouse contribution.

Contribution amount \$

Cheque number

**Please make the cheque payable to EISS Super and attach to this form.**

## Your privacy is important to us

We are required to comply with relevant privacy laws. The personal information that we collect is used to process your application, administer your account(s), provide you with services and conduct research about how to improve our services and products. Unless required or authorised by law, we will only provide your personal information to authorised service providers who use the information to administer the Fund and provide services on our behalf.

The EISS Super Privacy Policy is available to view at [eisuper.com.au/privacy](https://eisuper.com.au/privacy) or you can obtain a copy by contacting us on 1300 369 901.

## Step 7. Sign the form

**This section should be completed by the member receiving the contribution.**

**By signing this form I:**

- acknowledge that I have read and understood this form;
- acknowledge that I have read and understood the information provided in the Product Disclosure Statement (PDS) and agree to be bound by it;
- confirm that I am eligible to receive this contribution as outlined in the Important Information section on this form and Step 4;
- understand that the information contained in this form will be handled by the Trustee to process the cheque contribution;
- understand that this contribution will be returned to me if I have not provided my TFN to EISS Super;
- understand that this contribution will be invested as per my future contributions strategy at the time the cheque is processed to my EISS Super account;
- accept that this contribution will remain preserved until my retirement;
- acknowledge that EISS Super is not responsible for monitoring the amount of contributions made to my account to ensure the Government imposed contribution cap limit is not exceeded;
- understand that nothing on this form constitutes financial advice or recommendations;
- understand and consent to my information being collected, disclosed and used in the manner set out in this form; and
- understand that, under Australian Taxation Office (ATO) regulations, I must keep a copy of this form for five (5) years from the date completed.

Member Signature

X

Date

D D / M M / Y Y Y Y

Sign here

**Please return your completed form to:**

EISS Super  
GPO Box 7039,  
Sydney, NSW 2001.