

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 67, regardless of your employment status. If you're aged 67 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). From 1 July 2019, you may qualify for the work-test exemption when the following criteria is met:

- Your total super balance was less than \$300,000 on the previous 30 June; and
- You met the work-test in that financial year.

Please note, this exemption can only be used once.

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 live with your spouse and you are both Australian residents; and
- You're under age 75 and meet the relevant Work Test or Work Test exemption conditions (note: we cannot accept spouse contributions on your behalf if you are aged 75 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.

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 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 Balanced (MySuper) 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 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 and heading to the BPAY® section or you can call us.

Retirement Scheme and Defined Benefit Scheme

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 by either; uploading it into your online account or posting it 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

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 or call us on 1300 369 901.

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 67 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.

OR

- I wish to claim the work test exemption as I have met the work test in the previous financial year, had a total superannuation balance of less than \$300,000 at the end of the previous financial year and have never claimed a work test exemption previously.

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 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 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;
- 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

Date

/ /

Sign here

Please return your completed form by either:

Posting it to us OR Uploading it to your online account

EISS Super

GPO Box 7039

Sydney NSW 2001

Visit eisuper.com.au/login