

EISS Super

Contributions Splitting Application

About this form

Please complete this form if you (the 'Contributing Spouse') want to split your concessional (before tax) contributions with your spouse (the 'Receiving Spouse'). You must also enclose certified proof of your identity.

Please note, you are allowed to make one contribution splitting election per financial year and the election must be received by us no later than 31 May the following financial year.

Contributions splitting does not reduce the amount counted towards the Contributing Spouse's concessional contribution cap. Each year, EISS Super is required to report to the Australian Taxation Office (ATO) the contributions that were made, including any contributions that were later transferred to a spouse after a contribution splitting application.

It is the responsibility of each EISS Super member to monitor the amount of contributions made to their super to ensure the contributions caps are not exceeded. The general concessional cap is \$25,000, but may be increased depending on eligibility. Further information is provided in the 'Contribution Caps' fact sheet, available at eisuper.com.au/factsheets.

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

Member Number

Account Number

Mr / Mrs / Ms / Miss / Other

Given name(s)

Surname

Date of birth / /

Residential address (must be advised)

Suburb

State

Postcode

Postal address (if different to the above)

Suburb

State

Postcode

Telephone

Mobile

Email

If you have changed your contact details recently (i.e. address, phone number or email) you can also update this information by logging into your online account at eisuper.com.au/login. Doing this will ensure we are able to verify your membership and process your request without delay.

Step 2. Attach documentation if your personal details have changed

Name changes – attach a certified copy of a Marriage Certificate, Deed Poll or Change of Name Certificate from the Births, Deaths and Marriages Registration Office.

Date of birth changes – attach a certified copy of driver's licence, passport or your birth certificate.

Postal address changes – attach a copy of a recent bill, mail item or driver's licence that displays your new postal address. Alternatively, before completing this form, you can change your contact details online by logging into your online account at eisuper.com.au/login or by calling us on 1300 369 901.

Your personal details cannot be updated unless the necessary supporting documentation is provided.

Failure to provide these documents may result in your benefit being delayed or rejected.

See the 'Providing Proof of Identity' fact sheet attached to this form for details of how to certify documents.

Step 3. Personal details of spouse receiving your contributions

Mr / Mrs / Ms / Miss / Other

Given name(s)

Surname

Date of birth / /

Residential address (must be advised)

Suburb

State

Postcode

Tax File Number (TFN)

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In line with the Superannuation Industry (Supervision) Act 1993, and various taxation acts, the Trustee of EISS Super is authorised to ask for your TFN. The Trustee will only use your TFN for lawful purposes. These purposes may change in the future if there are changes to legislation.

Step 4A. Contributions splitting details

The contributions I would like to split with my spouse are contributions made to my super account during the previous financial year ended: 30/06/

Eligible pre-tax contributions to be split:

Pre-tax (also known as concessional) contributions are subject to 15% contribution tax and include deductible contributions such as employer and salary sacrifice contributions. Please determine the amount your spouse is to receive by selecting one of the options below.

Maximum allowed

The maximum amount will be the lesser of 85% of the total pre-tax contributions made to your account during the financial year or the concessional contribution cap.

OR

Dollar amount

\$, . (net of tax)

OR

Percentage

% (net of tax)

Note: Only eligible contributions made during the previous financial year can be split.

If you nominate an amount greater than the above maximums, the amount transferred will be reduced accordingly.

Step 4B. Contributions splitting details for exiting members

If you are withdrawing your entire super benefit from EISS Super you may also elect to split contributions made to your super account during the current financial year. Please nominate the amount you wish to split (note this section only applies to contributions made during the current financial year. To request a split for contributions made during the previous financial year you will also need to complete Step 4A above). Please ensure this form is submitted together with your 'Payment instruction' form.

Eligible pre-tax contributions to be split:

Pre-tax (also known as concessional) contributions are subject to 15% contribution tax and include deductible contributions such as employer and salary sacrifice contributions. Please determine the amount your spouse is to receive by selecting one of the options below.

Maximum allowed

The maximum amount will be the lesser of 85% of the total pre-tax contributions made to your account during the financial year or the concessional contribution cap.

OR

Dollar amount

\$, . (net of tax)

OR

Percentage

% (net of tax)

Note: Only eligible contributions made during the previous financial year can be split.

If you nominate an amount greater than the above maximums, the amount transferred will be reduced accordingly.

Step 5. Payment instructions

Advise the details of your spouse's super fund to which you would like to split your super contributions.

Note: You can only split contributions to an active super account held in the name of your spouse in a complying super fund. If your spouse doesn't have an active super account the Trustee will not be able to process your request. Your spouse may have the option of joining EISS Super. For details, including a copy of the relevant Product Disclosure Statement (PDS), available at eisuper.com.au or call us on 1300 369 901.

Option 1: Transfer to my spouse's EISS Super account

My spouse's EISS Super Account Number is

Option 2: Transfer to another fund

Name of fund

Fund ABN

Unique Superannuation Identifier (USI)

Membership or Policy number

A rollover to another fund cannot occur without the ABN and USI or Membership/Policy Number of your spouse's fund. If your spouse's rollover fund does not have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.

Rollovers to a Self-Managed Super Fund (SMSF)

We need you to provide the following additional information if you are transferring your super to a SMSF. Failure to provide this information may result in your benefit being delayed or rejected.

Fund address

Suburb

State

Postcode

Note: For a rollover to a registered SMSF, payment will only be sent to the address registered with the Australian Taxation Office (ATO).

SMSF Banking Details

Name of financial institution

BSB

Account number

Account name

You must provide a copy of the SMSF bank account, showing the bank account name and address match the SMSF.

We cannot accept personal banking statements.

A copy of the SMSF's bank account statement is attached

Step 6. How do you want to prove your identity

You'll need to provide proof of your identity when you take a cash payment or rollover/transfer to another super fund. You should read the information in the fact sheet attached to this form called 'Providing Proof of Identity' to check what proof of ID is required.

Choose (✓) one of the two options below:

Use my Tax File Number (TFN)

This option is only available if you want to rollover/transfer your super to a complying super fund (if you wish to take a cash payment or rollover/transfer your super to an SMSF, you'll need to provide certified proof of identity).

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. You don't have to provide your TFN, but if you do, this will ensure that any benefit you take from EISS Super does not incur additional tax. Please also refer to the 'How to Apply for a Super Payout' fact sheet for additional information about providing your TFN.

Enter your TFN here

By providing your TFN, you are authorising us to give this information to your other super fund.

Please note: We will validate your TFN and personal details with the ATO. If we cannot confirm an exact match with the ATO's records, you will be required to provide full Proof of Identity (see below) and your payout will be delayed.

I have attached certified proof of identity documents. For full details on providing proof of identity, refer to the 'Providing Proof of Identity' fact sheet attached or available on the fund's website at eisuper.com.au/factsheets or by calling us on 1300 369 901.

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.

I request that the Trustee of EISS Super splits the contributions detailed in Steps 4A and/or 4B to the superannuation account of my spouse as detailed in Step 5.

By signing this form I acknowledge that:

- once my contributions split is actioned, I will not be eligible for a further contributions split in respect of the nominated financial year;
- the amount transferred from EISS Super will be taken from the preservation components in the following order: preserved, restricted non-preserved, unrestricted non-preserved;
- if the contributions nominated to be split exceed the maximum allowed by the legislation or the Fund's rules, my nominated transfer amount will be reduced to the maximum allowable amount; and
- the value of my super in EISS Super (including any Death and Total and Permanent Disablement benefits) will decrease by the amount transferred out of EISS Super in accordance with this contributions split request.

I declare that the information provided on this form is correct and I declare that the person nominated as the receiving spouse in Step 3 is an eligible spouse, as defined in Step 8 'Receiving spouse declaration'.

I discharge the Trustee from any liability with respect to the amount of my super that is transferred.

Member Signature

X

Date

D D / M M / Y Y Y Y

Sign here

Step 8. Receiving spouse declaration (spouse to complete)

This section should be completed by the receiving spouse.

I declare that at the date of this application I am the receiving spouse* of the applicant and I:

- am under preservation age; OR
- have reached preservation age but am under 65 and I have not permanently retired from the workforce.

I consent to:

- my information being collected, disclosed and used in the manner set out in this form.

Spouse signature

X

Date

D D / M M / Y Y Y Y

Sign here

*A spouse is a person:

- who is legally married to the member; or
- with whom the member lives on a genuine domestic basis in a relationship as a couple (including a same-sex partner); or
- with whom the member is in a registered relationship under a law of State or Territory (including a same-sex partner).

The Trustee of EISS Super recommends that you seek advice from a licensed financial planner regarding your super before you make any decision in relation to contributions splitting.

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