# Contribute for your spouse



You can download and complete this form digitally, then upload a scanned or soft (digital) copy of it via australian super.com/upload-document

If you're filling this in manually, please complete in pen using CAPITAL letters and print (X) to mark boxes. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

Before adding to super, consider your financial circumstances, eligibility, contribution caps that may apply, tax issues and when your super can be accessed. We recommend consider seeking financial advice.

Complete this form and return it, along with a cheque payable to AustralianSuper, to make a contribution to your spouse. If you want to make a spouse contribution via BPAY\*, please ask your spouse to call us on **1300 300 273** to obtain their spouse contribution BPAY\* details and then make the payment through your usual BPAY\* facility using these details.

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# Work out if you can contribute for your spouse

# Who can receive spouse contributions?

We can accept spouse contributions if:

- your spouse is under the age of 75 years or if the contribution is received no later than 28 days after the end of the month they've turned 75; and
- · your spouse has an AustralianSuper account; and
- vour spouse has supplied their TFN.

# Important information

#### A spouse means:

- a person who is legally married to you
- a person who lives with you on a genuine domestic basis in a relationship as a couple (including de facto), or
- a person with whom you are in a relationship that is registered under law of a State or Territory.

#### Tax offset

A tax offset of up to \$540 may be available for up to \$3,000 of superannuation contributions made by a taxpayer on behalf of a non-working or low income spouse.

The offset is available if:

- you make after-tax (i.e. not salary sacrifice) contributions on behalf of your spouse; and
- you and your spouse are Australian residents for tax purposes when the contribution is made; and
- your spouse's total income including assessable income (disregarding released amounts under the First Home Super Saver scheme), reportable fringe benefits and reportable employer superannuation contributions is less than \$40,000; and

- your spouse has not exceeded their non-concessional contributions cap for the current financial year; and
- your spouse did not have a total super balance of \$2.0m or more immediately before the start of the financial year the contribution was made; and
- you're not living separately and apart from your spouse on a permanent basis.

# Contributions

Spouse contributions are treated as non-concessional contributions and form part of your spouse's non-concessional contributions cap. See the *Tax and super* fact sheet at **australiansuper.com/TaxGuide** 

# Preservation

Spouse contributions must be preserved as follows:

 if the receiving spouse has never been employed, then any benefits arising from spouse contributions are generally preserved until age 65. Contributions made to your spouse's super are subject to preservation rules. This means they generally cannot access contributions until they meet a condition of release.

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much you can contribute at australiansuper.com/ContributionLimits

Receiving spouse to complete this section.	
If your spouse is not an AustralianSuper member, please contact their super fund for details. If they do not have a super account and would like to join AustralianSuper, they can join at <b>australiansuper.com/join</b> or call <b>1300 300 273</b> . To determine if this product is right for them, please read the <i>Personal Plan Product Disclosure Statement</i> which can be found at <b>australiansuper.com/pds</b>	
Last name Mr Mrs Ms Miss Di	r
First name/s Date of birth	
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Your spouse's AustralianSuper member number  Tax file number  Tax file number	
We're authorised under super law to collect, use and disclose your Tax File Number (TFN). It's optional to provide your TFN but if we have it, we'll be able to accept all types of contributions from you, you won't pay more tax than you need to and it'll be easier to find your super. If you transfer your super to anothe fund, we'll give them your TFN unless you tell us not to in writing. We will need your TFN in order for us to process spouse contributions. If you have already provided your TFN, you do not need to provide it again.	er
4 Sign this form	
We have read the Privacy Collection Statement as set out on page 2 of this form, and how AustralianSuper will use our person information. To the best of our knowledge, the information we have provided on this form is correct.	ıal
My spouse meets the eligibility criteria for me to be able to contribute on their behalf.	
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# **Privacy Collection Statement**

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria, 3001, collects your personal information (PI) to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to perform these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our contact centre provider (Concentrix Services Pty Ltd), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to australiansuper.com/privacy or call us on 1300 300 273.