

# CONTRIBUTION SPLITTING

If eligible, you can split contributions from your super account into the super account of your spouse. You will need to complete this form to request a split for contributions relating to the previous financial year.

Before completing this form please read our fact sheet **Split super contributions with your spouse** at [ngssuper.com.au/PDS](http://ngssuper.com.au/PDS)

## If you need help

If you're unsure of your decision, consider obtaining professional advice. We offer single-issue advice limited to your NGS Super account at no cost:

- over the phone through our Financial Advice Helpline or
- through our **Customer Relationship Managers**.

Further, we offer low-cost tailored advice through NGS Financial Planning. To make an appointment phone us on 1300 133 177 or complete the **Financial planning enquiry form** on our website at [ngssuper.com.au/advice](http://ngssuper.com.au/advice)

**Please send your completed form and any requested documents to:**

**NGS Super  
GPO Box 4303  
MELBOURNE VIC 3001**

Step 1. Complete your personal details
Please print in black or blue pen, in uppercase, one character per box. A ✓

  

NGS Member number	Title	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names		
<input type="text"/>		
Surname		
<input type="text"/>		
Previous name (if applicable)		
<input type="text"/>		
Residential address <b>(must be advised)</b>		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address (if different to above)		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone		
<input type="text"/>		
Personal email		
<input type="text"/>		
Tax file number		
<input type="text"/>	<input type="text"/>	<input type="text"/>

You are not required to provide your tax file number (TFN) to us. If we don't have your TFN, we cannot accept personal contributions from you (and other member contributions), and extra tax may be deducted from your employer contributions.

## Step 2. Attach documentation if your personal details have changed

**Name and date of birth changes** — attach a **certified** copy of supporting documentation (see **Step 3** for information about who can certify documents and sample certification wording).

**Address changes** — attach a copy of a recent bill, mail item or driver's licence that displays your new residential or postal address.

**If the required supporting documentation is not provided, the processing of your transaction will be delayed.**

## Step 3. Attach proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence (front and back) or passport (or acceptable alternatives). You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than two years' continuous service. For a full list of people who can certify documents and acceptable alternative documents, please visit [ngssuper.com.au/POI](https://ngssuper.com.au/POI). An example of how to certify documents is shown below.

I have attached a certified copy of the appropriate proof of identity.

Failure to provide appropriate proof of identification may result in delays in the processing of your transaction.

### How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- written or stamped 'certified true copy'
- signature and printed full name
- qualification (such as Justice of the Peace, Australia Post employee with more than 2 years' continuous service, etc.)
- date (the date of certification must be within the 12 months prior to our receipt).



← A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).

Certified true copy ← Write or stamp 'certified true copy' of the original document.

J. Sample ← The authorised person's signature.

Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person.

Justice of Peace ← Date of certification (within 12 months of receipt by NGS).

Registration No.123456789 ←

Date: 01/07/2022 ←

### Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

### Important note

The information in this document is a guide only and we may request additional documentation prior to any payment.

## Step 4. Personal details of spouse receiving your contributions

Title	Date of birth	Telephone
<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names	<input type="text"/>	
Surname	<input type="text"/>	
Address	<input type="text"/>	
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Step 4. Personal details of spouse receiving your contributions (continued)

### Details of spouse's super account

The details below will help us identify your spouse's super account. It is important to complete all details as the trustee may not be able to process your request otherwise.

Fund name<sup>1</sup>


#### This fund is a Self Managed Super Fund (SMSF)

**Note:** All payments to an SMSF will be paid by EFT. Please ensure the SMSF bank details are up-to-date on the ATO's website [abr.gov.au](http://abr.gov.au). Please provide a copy of the SMSF's bank account statement. Payments can only be processed if you have provided your SMSF's Electronic Service Address (ESA).

Name of financial institution

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BSB

Account number

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Account name

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Electronic Service Address (ESA)<sup>1</sup>

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Fund address

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Suburb

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State

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Postcode

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Telephone

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Fund ABN<sup>1</sup>

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Unique Superannuation Identifier (USI)<sup>1</sup> (if not NGS Super)

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Membership or policy number<sup>1</sup>

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Spouse's tax file number\*

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\* You are not required to provide your spouse's tax file number (TFN) to us. However, if your superannuation fund does not have your TFN, they cannot accept personal contributions (and other member contributions) and extra tax may be deducted from your employer contributions (and other assessable contributions).

If your spouse is not a member of a super fund, they can join NGS Super. For details, download a copy of our [Product Disclosure Statement](#) at [ngssuper.com.au/PDS](http://ngssuper.com.au/PDS) or call us on 1300 133 177.

<sup>1</sup> A transfer to another fund cannot occur without the ABN, USI/ESA and Membership/Policy Number of the fund you are transferring to. If you are splitting contributions to an SMSF, you will also need to supply a copy of a bank statement of the Fund. If the fund you are splitting contributions to 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.

## Step 5. Contributions splitting details

Contributions you split must be from the previous financial year, unless you are planning to close your account with NGS Super, in which case you can also split the current financial year.

You cannot split more than 85% of your eligible contributions for the financial year you nominate.

Eligible contributions include:

- employer contributions (including salary sacrifice contributions)
- personal contributions you made for which you have claimed a tax deduction, noting that you must have claimed the tax deduction **before** you lodge this form.

### Previous financial year:

30 June  Amount \$ .00 **OR** Percentage %

**Current financial year:** If completing this row, please ensure this form is submitted together with your **Request for withdrawal form**

30 June  Amount \$ .00 **OR** Percentage %

If you nominate an amount greater than the legislated concessional contribution cap, the amount transferred will be reduced accordingly. Your account balance must not fall below \$10,000 following the split.

For more details on concessional contribution caps, please see our fact sheets **Split super contributions with your spouse** and **Opportunities and limits for super contributions** available at [ngssuper.com.au/PDS](http://ngssuper.com.au/PDS).

## Step 6. Sign the form (member to complete)

I request that the trustee of NGS Super split the contributions detailed in Step 5 to the superannuation account of my spouse as detailed in Step 4.

By signing this form I acknowledge that I have read and understood the fact sheet **Split super contributions with your spouse** and I understand 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 NGS Super will be taken from the preservation components in the following order: preserved, restricted non-preserved, unrestricted non-preserved
- my nominated transfer amount will be reduced, if necessary, to ensure that I maintain an account balance of at least \$10,000 in my member account in NGS Super
- 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
- the value of my super in NGS Super (including any Death and Total and Permanent Disablement benefits) will decrease by the amount transferred out of NGS Super in accordance with this contributions split request
- there may be a delay in payment if my details have changed.

I have read and understand the **Privacy Collection Statement** and consent to my personal information being collected, disclosed and used as described in that Statement.

I confirm that the person nominated as the receiving spouse in Step 4 is an eligible spouse, as defined in Step 7.

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

Member signature

Date  /  /

## Step 7. Receiving spouse declaration (spouse to complete)

I declare that at the date of this application I am the spouse<sup>2</sup> of the applicant and I:

- have not reached my preservation age or
- am between my preservation age and 65 years and have not permanently retired from the workforce.

Your preservation age depends on your date of birth. If you were born:

- before 1 July 1963, you have already reached your preservation age
- between 1 July 1963 and 30 June 1964, your preservation age is 59
- after 30 June 1964, your preservation age will be age 60.

I have read and understand the **Privacy Collection Statement** and consent to my personal information being collected, disclosed and used as described in that Statement.

Receiving spouse signature

X

Date   /   /

<sup>2</sup> The definition of spouse includes a person (of any sex):

- you are legally married to
- you are in a relationship with that is registered under certain state or territory laws
- who lives with you on a genuine domestic basis in a relationship as a couple (known as a 'de facto spouse').

**Note:** This section must be completed by the receiving spouse in order for the trustee to process the contributions splitting request.

## Submit your form

Please **return your completed form**, along with **certified proof of identity** and any required **supporting documentation** (see Steps 2 and 5) to:

**NGS Super**  
**GPO Box 4303**  
**MELBOURNE VIC 3001**

## Privacy Collection Statement

NGS Super Pty Limited ABN 46 003 491 487 of **Level 4, 14 Martin Place Sydney NSW 2000** collects personal information from you (or from third parties such as your employer or another super fund) to manage your NGS Super account, keep you informed, improve our products and services or take action on a matter you have contacted us about. If we don't have your personal information, we may not be able to perform these services. We may be authorised to collect your personal information by certain laws, including laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

We disclose personal information as required to manage the Fund, to service providers (including our administrator, our insurer and professional advisers), employers or parties required by law. Personal information may be accessed by service providers overseas, most likely by our administrator's processing centre in India. For any other offshore locations, details of how to access and change your personal information and the privacy complaints process, go to [ngssuper.com/pcs](https://ngssuper.com/pcs) and [ngssuper.com/privacy](https://ngssuper.com/privacy) or call us on **1300 133 177**.