SPOUSE CONTRIBUTION

You can contribute to NGS on behalf of your spouse provided we have their Tax File Number (TFN) on file. You will need to complete this form each time you make a spouse contribution.

If you need help

If you're unsure of your decisions, consider obtaining professional advice. We offer:

· advice at no extra cost through our advice Helpline, and

· low-cost advice through NGS Financial Planning.

To make an appointment phone us on 1300 133 177.

Please send your completed form with cheque (made payable to NGS Super) to:

NGS Super
GPO Box 4303
MELBOURNE VIC 3001

Step 1. Receiving spouse's details

Please print in black or blue pen, in capital letters, one character per box. A ✓

NGS Member number

Title

Date of birth / /

Given names

Surname

Postal address

Suburb

State

Postcode

Daytime telephone

Personal email

Tax File Number (TFN)*

* You are not required to provide your Tax File Number (TFN) to us. However, we can only accept spouse contributions for you if we have your TFN on file.

Step 2. Details of spouse's eligibility to receive contributions

To receive spouse contributions you must meet one of the eligibility criteria as required under superannuation law. To confirm your eligibility to receive a spouse contribution, please complete one of the following declarations:

(Select one option ◯)

◯ I am under age 67

◯ I am at least age 67 but under age 75 and I have met the work test[1] as defined below

◯ I am at least age 67 but under age 75 and I am eligible for the work test exemption[2] as defined below

[1]**The work test:** Those who are at least age 67 but under age 75 are required to work at least 40 hours in 30 consecutive days in the financial year to be eligible to make (and receive) contributions to super.

[2]**The work test exemption:** If your total super balance across all your super accounts (including your NGS Super account) at the previous 30 June is less than $300,000 you will be exempt from the work test for 12 months from the end of the financial year in which you last met the work test. This exemption applies only once.

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

Receiving spouse X

Date / /

Issued by NGS Super Pty Limited ABN 46 003 491 487 AFSL No 233154 the trustee of NGS Super ABN 73 549 180 515

Step 3. Make a contribution - contributing spouse

Title ☐☐☐☐ Date of birth ☐☐ / ☐☐ / ☐☐☐☐

Given names

Surname

I wish to contribute an amount of $ ☐☐☐,☐☐☐.☐☐ which represents a spouse contribution on behalf of my spouse named in Step 1, who is a member of NGS Super.

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

Step 4. Sign the form – contributing spouse

I wish to make contributions to NGS Super for the benefit of my spouse named above (Step 1) who is an existing member and eligible to receive such contributions. By signing this form I understand and declare that:

- any such contributions to the Fund are for the benefit of my spouse (the nominated spouse) and cannot be repaid to me
- the nominated spouse is my spouse within the meaning of relevant government legislation as set out in the fact sheet ***Make spouse contributions work for you*** available at **ngssuper.com.au/PDS**
- I must advise the Trustee if my nominated spouse ceases to be my spouse within the meaning of the legislation or, if between 67 and 74 ceases to be gainfully employed for at least 40 hours in any 30 consecutive days during the financial year in which the contribution is being made
- I am not entitled to a tax deduction for these spouse contributions
- my spouse and I are Australian residents and were not living separately and apart on a permanent basis
- 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.

Contributing spouse X Date ☐☐ / ☐☐ / ☐☐☐☐

Please return your completed form and cheque (made payable to NGS Super) 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.au/pcs** and **ngssuper.com.au/privacy** or call us on **1300 133 177**.

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