

# CONTRIBUTION SPLITTING

Before completing this form please read the fact sheet *Split super contributions with your spouse* available from NGS Super Customer Service Team on **1300 133 177** or refer to the NGS Super website **www.ngssuper.com.au**.

## Step 1. Complete your personal details

Please print in black or blue pen, in uppercase, one character per box.



Title Mr  Mrs  Ms  Miss  Other    Date of birth   /   /

Given names

Surname

Previous name (if applicable)

Residential address (must be advised)

Suburb                      State    Postcode

Postal address (if different to above)

Suburb                      State    Postcode

Daytime telephone   -         Mobile

E-mail

Membership number

Name of your employer

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

**Name and Date of birth changes** – see the 'Completing proof of identity' section for details of what to provide and how to and who can certify documents.

**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 payment of your benefit will be delayed.**



### Step 3. Attach proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence 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' service. For a full list of people who can certify documents and acceptable alternative documents, please visit [www.ngssuper.com.au/completing-proof-of-identity/](http://www.ngssuper.com.au/completing-proof-of-identity/). 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 payment(s).

#### 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, 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)  
← Registration No.123456789  
← Date: 01/02/2012

#### 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 Mr  Mrs  Ms  Miss

Date of birth  /  /

Given names

Surname

Postal address

Suburb

State

Postcode

Daytime telephone

Mobile

#### Details of spouse's super fund

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.

Membership number<sup>1</sup>

Fund name

This fund is a Self Managed Super Fund

Please note: All payments to a Self Managed Super Fund will be sent to the registered address unless you specifically request your payment be mailed to your financial adviser. Please ensure the fund address is up-to-date on the ATO's website [www.superfundlookup.com.au](http://www.superfundlookup.com.au).

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## Step 5B. Contributions splitting details for exiting members (only complete this section if you are leaving NGS Super)

If you are withdrawing your entire superannuation benefit from NGS 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 5A above). Please ensure this form is submitted together with your 'Benefit Payment Instructions' form.

### Eligible concessional contributions to be split:

(e.g. deductible contributions such as employer and salary sacrifice contributions)

(tick one circle only)

Maximum allowed

OR

Dollar Amount (enter amount and tick whether net or gross of tax<sup>2</sup>)

\$

NET or  GROSS

OR

Percentage (enter percentage and tick whether net or gross of tax<sup>2</sup>)

%

NET or  GROSS

<sup>2</sup> Concessional contributions are subject to 15% contribution tax. If you nominate a **gross** dollar amount or percentage above, the amount transferred will be reduced by 15% to allow for this tax. If you nominate a **net** dollar amount or percentage above, the amount transferred will be as per your nomination (subject to any applicable maximums).

**Note:** Only eligible contributions made during the current financial year can be split. The total gross contributions split amount nominated cannot exceed a maximum of the total concessional contributions made to your account during the financial year or the concessional contribution cap<sup>3</sup> (whichever is the lesser).

If you nominate an amount greater than the legislated concessional contribution cap, the amount transferred will be reduced accordingly. If the amount you nominate would leave you with a leaving service benefit of less than \$5,000, the amount transferred will be limited so that your leaving service benefit is at least \$5,000.

<sup>3</sup> Refer to the fact sheet *Split super contributions with your spouse* for details of the applicable limit.

## Step 6. Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- Provided your member details in **Step 1**?
- Attached supporting documentation for any change of name, date of birth or address detailed in **Step 2**?
- Provided complete Contribution splitting details in **Step 5A and Step 5B (if applicable)**?
- Signed and dated the form (**Step 7**)?
- Receiving spouse has signed and dated the form (**Step 8**)?

### Completing Proof of Identity

Have you attached the correct identification as outlined in the Completing proof of identity section?  
Select the identification you have provided:

One Primary identification document; or

Two Alternative identification documents (one from each of the lists specified)

Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.

Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:

Written or stamped 'certified true copy'

Signature and printed name

Date – the date MUST be within twelve months of the date we receive your completed form.

Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the Completing proof of identity section for more details on how to certify a document and a list of valid certifiers.



## Step 7. Sign the form (member to complete)

I request that the trustee of NGS Super splits the contributions detailed in Steps 5A and/or 5B 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 a leaving service benefit of at least \$5,000 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 8.

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

Signature  Date  /  /

## Step 8. Receiving spouse declaration (spouse to complete)

I declare that at the date of this application I am the spouse<sup>4</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 – see the table below:

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	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.

Signature  Date  /  /

<sup>4</sup> A spouse is a person:

- who is legally married to the member;
- 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).

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

The trustee of NGS Super recommends that you seek professional advice before you make any decision in relation to contributions splitting.

**Please return your completed form, together with your proof of identity, to NGS Super, GPO Box 4303, Melbourne, VIC 3001.**



# PRIVACY COLLECTION STATEMENT

## If you are a member of NGS Super, or you are applying for membership

**We may collect your personal information** from you or from third parties such as

- your employer
- a previous super fund
- your financial adviser
- our related entities
- publicly available sources.

We may be required or authorised by law to collect your personal information. Relevant laws include the Australian Securities and Investments Commission Act 2001, Corporations Act 2001, Family Law Act 1975 and laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

If we are unable to collect all the personal information we have asked for, we may not be able to administer your NGS Super account or take action on a particular request you have made.

**We will use your personal information** to

- manage your NGS Super account (superannuation or income stream)
- give you information about your NGS Super account
- supply you with information about other products and services offered by us or our related companies
- include your relevant account data in statistics and market research.

**We will disclose your personal information** to various organisations (but only as required to manage your NGS Super account or the Fund generally), including

- our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer)
- our insurer
- our professional advisers
- your employer
- other service providers that provide services or products relevant to your NGS Super account
- any relevant government authority that requires your personal information to be disclosed.

In managing your super your personal information may be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policy lists any other relevant offshore locations.

Our **Privacy Policy** sets out in more detail

- how we deal with your personal information
- how to access and seek correction of the information we hold about you
- how you may lodge a complaint if we breach an Australian Privacy Principle
- how we will handle any complaint.

You can view our Privacy Policy at [www.ngssuper.com.au/privacy-policy](http://www.ngssuper.com.au/privacy-policy) or obtain a copy by contacting us on **1300 133 177**.

If you have any other queries in relation to privacy issues, or if you do not wish to receive marketing material, you may contact us on **1300 133 177**. You may also write to the NGS Super Privacy Officer at PO Box 21236 World Square NSW 2002 or online at [www.ngssuper.com.au/contact-us](http://www.ngssuper.com.au/contact-us).

## If you are not a member of NGS Super, and you are not applying for membership

We will use your personal information only to enable us to take action on the particular matter you have contacted us about. In most instances we will not need to collect any further personal information from any other source. We will disclose your personal information only to those organisations mentioned above as are necessary to take action on the matter in question or for the management of the Fund generally.