

Contributions split form

B02



Use this form to advise LGIAsuper to split your contributions with your spouse.

LGIAsuper must receive this form by 31 May to split contributions for the previous financial year.

See our *Super for your partner info sheet* for more details.

Personal details LGIAsuper respects your privacy. All personal information collected is protected in line with LGIAsuper's Privacy policy.

Surname	Given name/s	Title	Member number	Account number
Residential address				
Suburb/town		State	Postcode	
Postal address (Write 'as above' if same as residential)		Suburb/town	State	Postcode
Telephone (b/h)	Email address	Date of birth / /	Tax file number	

1 Contributions splitting details

I would like to split the following taxed contributions into my spouse's account for the:

- Current financial year OR Previous financial year
 Maximum amount OR Other amount \$

Note: You can only split contributions for the current financial year if you are closing your LGIAsuper account.

A minimum of \$500 must be contributed and a maximum amount may be capped to ensure account balance does not fall below \$3,000.

2 Receiving spouse details

Surname	Given name/s	Member number*		
Address				
Suburb/town		State	Postcode	
Telephone (b/h)	Email address	Date of birth / /	Tax file number	

*if existing LGIAsuper member

I would like to:

- Open an LGIAsuper account
You should read the Product Disclosure Statement available from our website for more details on how this account works and join at Member online. Your money will be invested in the default option.
- Transfer to another superannuation fund. **Complete section 3 over the page.**
Only provide certified proof of identification if you are transferring your benefit to a self-managed superannuation fund.
- Contribute to an existing LGIAsuper account (to the member number recorded in **section 2**).
Your money will be invested in the default option unless you have previously selected a preference for future contributions. You can change the way your account is invested at Member online.

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LGIAsuper ABN 23 053 121 564


LGIAsuper
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3 Other fund details

Fund name	Other fund USI*	Other fund ABN	
Member account number	Cheque to be payable to	Telephone (b/h)	
Address	Suburb/town	State	Postcode

To transfer your benefit we must have either a **Member account number** or the **USI** of the other fund and its ABN.

*Unique superannuation identifier.

4 Receiving spouse declaration

You are able to receive split concessional contributions while you are under age 65. If you have reached your preservation age and permanently retired or have met another condition of release you are unable to receive a contribution split.

- I am under preservation age (see Preservation Age table in *Important information* section)
- I am between preservation age and 64 and have not permanently retired

5 Contributing member declaration

I/we certify the information I/we have provided is true and correct.

I/we certify at the time of making this request, we live together on a permanent and genuine domestic basis, in a relationship as a couple.

I/we have read and understood the *Super for your partner info sheet* and the Product Disclosure Statement.

Member signature	Spouse signature	Date / /
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Important information

Tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, LGIASuper is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. LGIASuper may disclose your TFN to another superannuation fund, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- LGIASuper will be able to accept all types of contributions to your accounts
- The tax on contributions to your superannuation accounts will not increase
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- It will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire

Certified proof of identification

If you are transferring your money to a self-managed super fund, Australian Government legislation requires you to provide the following proof of identification before your payment can be processed:

Your current **driver's licence** OR current **passport**.

For full details on which documents you can provide and for a list of who can certify your documents, view the *Proof of identity requirements* info sheet available from lgiasuper.com.au or call us and we will mail you a copy.

Preservation Age Table

Date of Birth	Preservation Age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60