

# Application to split superannuation contributions



You should use this form if you want to split your before-tax (concessional) superannuation contributions with your spouse. See **Notes: What is super contribution splitting?** for more information.

Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. You can also fill in this form online, print it and send it to us. The form is on our website at [aware.com.au/forms](http://aware.com.au/forms).

If you have any questions, please call us on 1300 650 873.

**i** It isn't compulsory to provide your TFN but if you don't, you may pay additional tax and your contributions may not be accepted. See **Notes: Your personal details**

## 1. Your personal details

Member number	Account number*	Date of birth (DD-MM-YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Last name	
<input type="text"/>	<input type="text"/>	
Given name(s)		
<input type="text"/>		
Address		
<input type="text"/>		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Daytime contact number	Mobile number	
<input type="text"/>	<input type="text"/>	
Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)		
<input type="text"/>		
Tax file number		
<input type="text"/>	<input type="text"/>	<input type="text"/>

\* You can only make one application each financial year. If you have contributions in more than one account you wish to split, you must complete separate forms for each account and send them to us together.

## 2. Receiving spouse details

This section must be completed for ALL receiving spouses. Your spouse must have an active account with a superannuation fund where the split contributions will be paid. If your spouse is NOT a member of Aware Super, you must also complete **Section 3 Receiving spouse fund details**.

Member number (if Aware Super)	Account number (if Aware Super)	Date of birth (DD-MM-YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Last name	
<input type="text"/>	<input type="text"/>	
Given name(s)		
<input type="text"/>		
Address		
<input type="text"/>		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Daytime contact number	Mobile number	
<input type="text"/>	<input type="text"/>	



**i** Please ensure that you include your spouse's receiving fund's full address, Unique Superannuation Identifier (USI) and member number or we may not be able to process your request. See **Notes: Receiving spouse fund details** for more information.

### 3. Receiving spouse fund details (if NOT Aware Super)

Name of fund

Postal address of fund

Suburb  State  Postcode

Fund ABN  Unique Superannuation Identifier (USI)

Member number  Contact number of the fund

**i** You can only apply to split your contributions in the financial year *after* the contribution is made. There is an exception to this rule: if you are withdrawing or transferring your total benefit (including to another account in Aware Super), then you must apply to split your contributions at the time of the request.

### 4. Amount to be split

Only concessional (before-tax) contributions can be split to your spouse's superannuation account. Record either the dollar amount or the percentage of eligible concessional contributions that you wish to split to your spouse's superannuation account.

I wish to split contributions that were made in the financial year ending 30-06-

Amount to be split: \$  ,  (whole dollars)

OR

% of my concessional contributions (up to a maximum of 85%)

### 5. Privacy

The personal information provided on this form is collected by and held for Aware Super by the fund administrator, Mercer Administration, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit [aware.com.au/privacy](http://aware.com.au/privacy) to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

**i** You must provide certified proof of identity (POI) before we can process your application. See **Notes: Proof of identity** for more.

### 6. Member declaration

I declare that the information provided on this form is correct. If I have nominated contributions in the current financial year, I declare that I will be closing this account this financial year and withdrawing or rolling over all benefits. I authorise the secure disclosure of my personal information to the Australian Tax Office so they can verify my identity if necessary.

I have read and understand the Aware Super privacy policy.

**p** Please sign and date form here and print your name.

Signature  Date signed (DD-MM-YYYY)

Name (print in CAPITAL letters)



A statutory declaration under the Statutory Declarations Act 1959 must be witnessed by an authorised person. See page 3 of the Notes.

## 7. Spouse Statutory Declaration

I, (name of receiving spouse)

of (address)

Suburb

State

Postcode

Occupation

make the following declarations under the *Statutory Declarations Act 1959*:

- At the date of this application, I am the spouse of the applicant AND I have not reached my preservation age (of 55 years or more) OR I have reached my preservation age but am not yet 65 and have not retired.
- I have read and understand the Aware Super privacy policy.

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the *Statutory Declarations Act 1959*, and I believe that the statements in this declaration are true in every particular.

Signature of receiving spouse **NOTE: Do not sign the form until you are with an authorised witness.**

Date (DD-MM-YYYY)

 -  -    

Declared at (address)

Suburb

State

Postcode

The applicant has signed before me:

Signature of witness

Date (DD-MM-YYYY)

 -  -    

Name of witness (please PRINT in full)

Qualification

Address

Suburb

State

Postcode

Email (optional)

Contact number (optional)

Note 1: A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years—see section 11 of the *Statutory Declarations Act 1959*.

Note 2: Chapter 2 of the *Criminal Code* applies to all offences against the *Statutory Declarations Act 1959*—see section 5A of the *Statutory Declarations Act 1959*.



Send the form to this address.

## 8. Where to send your completed form

We require **original** copies of this form. Please post the completed form to **Aware Super, PO Box 1229, WOLLONGONG NSW 2500.**

## What is a Statutory Declaration?

A statutory declaration is a written statement that allows a person to declare something to be true. When you make a statutory declaration, you are declaring that the statements in it are true. If you intentionally make a false statement in a declaration you can be charged with an offence which has a penalty of four years imprisonment. A Commonwealth statutory declaration must be signed in the presence of an authorised witness. For a complete list of authorised witnesses, go to the Attorney-General's Department website at [www.ag.gov.au](http://www.ag.gov.au).

## What is super contribution splitting?

Each financial year, you can apply to make a single lump sum split of your previous year's before-tax (concessional) contributions (which includes salary sacrifice, employer and personal deductible contributions) in favour of your spouse. You cannot split your after-tax (non-concessional) contributions.

Generally, you may split up to the lesser of:

- 85% of your concessional contributions for a financial year; or
- the concessional contributions cap for the financial year.

Only one irrevocable application to split contributions can be made in a financial year. If you have more than one account with Aware Super with contributions you wish to split in favour of your spouse, you must apply to split the contributions for all accounts at the same time. You should complete a separate form for each account, but return the forms to us together. You can request that the split amount be sent to your spouse's account in Aware Super, or to another superannuation fund your spouse is a member of.

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
After 30 June 1964	60

Spouse contribution splitting is not available for amounts rolled into Aware Super or amounts previously transferred to your account under a spouse contribution splitting arrangement. Also, spouse contribution splitting is not available if your super is subject to a payment split or payment flag under a Family Law agreement or court order.

You may **not** split contributions if your spouse:

- is aged 65 or more, or
- has reached preservation age and retired from the workforce.

If you wish to split your contributions with your spouse, you and your spouse should complete the relevant sections of this form. If your spouse is not already a member of a super fund, they can join Aware Super by completing the application form in the back of the *Member Booklet (Product Disclosure Statement)* for personal members. Copies of the *Member Booklet* are also available from our website and customer service.

### Submitting your application

Applications must be lodged between 1 July following the end of the financial year in which the contributions were made and the next 30 June. However, if you are withdrawing or transferring your total benefit (including to another account in Aware Super), then you can apply to split your contributions made in that financial year. You should apply to split contributions at the time you apply to withdraw or transfer benefits. If you will be arranging the transfer through another super fund, apply to split your contribution before you arrange this transfer.

Both you and your spouse will be notified in writing once your application to split contributions has been processed.

## Your personal details

### Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, the trustee is authorised to collect, use and disclose your TFN. The trustee may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you write to your super fund and ask the trustee not to disclose your TFN to any other trustee. It is not compulsory to provide your TFN but if you don't, you may pay additional tax on your contributions and benefit payments, and some contributions may not be accepted.

### Email address

The email address you provide will replace any email address we currently hold for you. For security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as `employee_title@company.com.au`.

## Receiving spouse fund details

If your spouse is **NOT** a member of Aware Super, this section is for your spouse's superannuation fund details. Your spouse must have an active account with the nominated superannuation fund before the contributions can be split. Please ensure that you include your spouse's superannuation fund's full name and address, Unique Superannuation Identifier (USI) and their member number or we may not be able to process your request. Your spouse can check these details with their superannuation fund.

## Proof of identity

We require a certified copy of proof of identity (POI) document(s) before we can split your contributions. If you have already provided a certified copy of your POI document(s), you do not have to provide it again, unless it has expired, or your name and address have changed. If either of these have changed, you must provide a certified copy of an updated POI document(s) verifying the change(s):

### Change of name

If you have changed your name, you must provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificates cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your original maiden name and your married name.

### Change of residential address

If you have changed your residential address, you must provide a certified copy of a POI document showing your *new residential address*. If it is more convenient, you can provide the original (rather than a certified copy) of a recent notice issued by your local council or a recent utilities bill addressed to you at *your current residential address*.

### Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

## Acceptable documents and certification

Providing certified proof of your identity is a three-step process:

- 1 Collect your originals**  
Collect your proof of identity document(s). We have listed the documents you can use below.
- 2 Photocopy your originals**
- 3 Certify your copies**  
Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines are included under **Certification of personal documents**.

You can provide:

### Either:

A certified copy of one of the following documents:

- A current Australian state/territory driver's licence containing your photograph
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier\*

### Or:

One certified document from this list:

- An Australian birth certificate or extract issued by a state or territory
- A citizenship certificate issued by the Commonwealth
- A current Centrelink pension card that entitles you to receive financial benefits

**AND** One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter

\*If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

## Proof of identity (continued)

### Have you changed your name or residential address?

If you have changed your name, you must provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificates cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your original maiden name and your married name.

If you have changed your residential address, you must provide a certified copy of a POI document *showing your new residential address*. If it is more convenient, you can provide the original (rather than a certified copy) of a recent notice issued by your local council or a recent utilities bill addressed to you at *your current residential address*.

### Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "I certify that this document is a true copy of the original", followed by their signature, printed name, address, qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date.

#### If you are in Australia

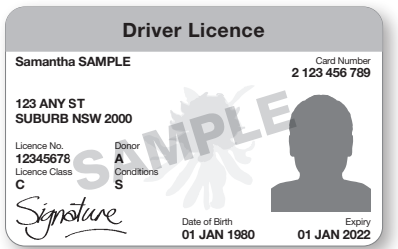
The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at [www.ag.gov.au](http://www.ag.gov.au).

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- Financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

**i** Samantha Sample has provided a copy of her identification that includes her signature, full name, date of birth and current residential address.

**✓** The authorised person has sighted the original identification and confirmed that the copy is a true copy.

**✓** Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



"I certify that this document is a true copy of the original."

*K Anderson*

Name: Kate Anderson  
Address: 6 Some St, Suburb NSW 2000  
Qualification: JP  
Registration no: 123456  
Date: 31 March 2020

#### If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.