

Super contribution splitting

GESB SUPER AND WEST STATE SUPER

Member Services Centre 13 43 72 Facsimile 1800 300 067 gesb.com.au
PO Box J 755, Perth WA 6842 Level 4 Central Park, 152 St Georges Terrace, Perth

This form enables you to:

- Split your contributions with your spouse. Your spouse doesn't have to be a current GESB member to receive your contribution.
- Open a new GESB Super account for your spouse if you would like to keep the split contributions with GESB.
- Select how much of your super you would like to split with your spouse either within the current financial year or in the previous financial year.

SECTION 1 YOUR DETAILS

GESB member number

WIN No. Office Use Only

Mr Mrs Miss Ms Other

Surname (family name) please print

Given names

Date of birth / / Male Female

Age next birthday

Residential address

 Postcode

Postal address (If different from residential)

 Postcode

Email address

Telephone – home Telephone – work

 () ()

Telephone – mobile

SECTION 2 DEPOSITING CONTRIBUTIONS

Complete the section relevant to one of the following three options:

Option 1. Deposit contributions into your spouse's existing West State Super or GESB Super account

Spouse's GESB member number (if applicable)

WIN No. Office Use Only

Email address

Telephone – home

 ()

Telephone – work

 ()

Telephone – mobile

Your contribution will be allocated to your spouse's GESB Super or West State Super account and invested in your spouse's nominated investment plan. If your spouse has not nominated an investment plan, the contribution will be invested in the Balanced Growth plan for GESB Super or Balanced plan for West State Super (the default investment plans for these schemes). Your spouse can change or nominate an investment plan by using Member Online or by completing an 'Investment choice' form available at gesb.com.au.

Option 2. Open a GESB Super account for your spouse

Mr Mrs Miss Ms Other

Surname (family name) please print

Given names

Date of birth / / Male Female

Residential address

 Postcode

Postal address (If different from residential)

 Postcode

FOR OFFICE USE ONLY



Option 2. continued

Email address

Telephone – home

Telephone – work

Telephone – mobile

Your contribution will be allocated to your spouse’s GESB Super or West State Super account and invested in your spouse’s nominated investment plan. If your spouse has not nominated an investment plan, the contribution will be invested in the Balanced Growth plan for GESB Super or Balanced plan for West State Super (the default investment plans for these schemes). Your spouse can change or nominate an investment plan by using Member Online or by completing an ‘Investment choice’ form available at gesb.com.au.

Spouse’s tax file number (TFN)

Important Note:

GESB is authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993.

Use and disclosure of TFNs are strictly regulated by the tax laws and the Privacy Act.

Declining to provide your TFN is not an offence. However, if you do not provide your TFN:

- You may pay more tax on your superannuation benefits than you have to
- Super contributions made by your employer (including salary sacrifice contributions) may be taxed at an extra 31.5%
- We may be unable to accept your personal, after-tax contributions which could affect your eligibility for the Commonwealth Government Super Co-contribution
- You may be unnecessarily liable for the Superannuation Contributions Surcharge in relation to contributions pre 1 July 2005
- It may be more difficult to locate and amalgamate your superannuation benefits in the future

The purpose for which your TFN can be used and the consequences of not quoting it may change in the future as a result of changes in the law.

If you do not wish to have your TFN passed on to your other superannuation fund, tick this box

For more information on providing your TFN you can call the ATO Superannuation Helpline on 13 10 20.

I declare that the information provided about my TFN is true and correct.

Receiving spouse

Signature

Date

Option 3. Deposit my contribution into my spouse’s existing super fund account in another super fund

If this contribution is going to a self managed super fund, see the note below.

Mr Mrs Miss Ms Other

Surname (family name) please print

Given names

Date of birth

Male

Female

Residential address

Postcode

Postal address (If different from residential)

Postcode

Email address

Telephone – home

Telephone – work

Telephone – mobile

Name of spouse’s fund

Address of fund

Postcode

Telephone number of fund

Fund’s Australian Business Number (ABN)

Fund’s Superannuation Product Identification Number (SPIN)

OR

Fund’s Registrable Superannuation Entity Number (RSE)

Spouse’s member number (in Fund)

Note: If rolling to a Self Managed Super Fund (SMSF) provide a **certified copy of** (see Section 6):

- The letter from the Australian Business Register regarding SMSF registration. This letter should also show the address of the destination fund.

SECTION 3 REQUEST AND DECLARATION

Contributing spouse

1. I request that GESB splits the contributions detailed in Section 3 to the super account of my spouse as detailed in Section 2.
2. If I have elected to split current financial year contributions I have completed a Benefit Access form to access my benefit and I am closing my account.
3. I understand this is restricted to one valid application per financial year.

Your signature

X

Date

/ /

Receiving spouse

This part only needs to be completed if you selected Option 1 or 2 (if you are a new or existing GESB member)

In signing this form I acknowledge that:

1. I understand that the contribution will be allocated to my West State Super or GESB Super account and invested in my nominated investment plan. If I am a new member of GESB Super and have not nominated an investment plan I understand all monies will be invested in the default Balanced Growth investment plan.
2. If I am a new member, I have read the GESB Super Product Information Booklet and understand it serves as general information only and does not contain financial advice.
3. I understand that any benefits accruing on my behalf in West State Super or GESB Super are subject to rules and conditions of release applicable to that scheme, including preservation standards (see relevant Product Information Booklet).
4. I declare that at the date of this application I am the spouse of the applicant and I am aged:
less than the preservation age (currently 55 years)
OR
between the preservation age (currently 55 years) to 65 years and have not retired from the workforce.

Signature

X

Date

/ /

Both spouses

In signing this form we confirm:

At the time of making this application we live together on a bona fide domestic basis as a married couple or de facto partners.

Contributing spouse

Your signature

X

Date

/ /

Receiving spouse

Signature

X

Date

/ /

SECTION 4 HOW MUCH OF MY CONTRIBUTION TO SPLIT

Contributions to be split from my following account:

GESB Super

West State Super

Previous financial year ending

30 / 06 / 20_____

Contributions to be split:

Nominated amount \$

OR total amount available

OR

Current financial year

Contributions to be split:

Nominated amount \$

OR total amount available

Note: If you are splitting a contribution for the current financial year, you must be closing your account. Complete and return the relevant 'Benefit access' form available from your Member Services Centre.

SECTION 5 POST TO GESB

Please post the following documents

Superannuation Contribution Splitting application form

Original Certified Proof of Identity for both spouses.
Refer to Section 6 for more information.

Relevant Benefit access form if I have elected to split current financial year contributions.

to:

GESB
PO Box J 755
Perth WA 6842

How long will it take?

We aim to process your request within 20 days after receiving your form and all necessary information. However, there are circumstances where it may take us longer to process your request.

(continued overleaf)

SECTION 6 COMPLETING YOUR PROOF OF IDENTITY

BOTH SPOUSES

GESB is required to confirm your and your spouse's identity before you can split your contributions.

1. ACCEPTABLE DOCUMENTS

One document from **LIST A** **OR** one document **EACH** from **LIST B** and **LIST C**.

<p>List A</p> <ul style="list-style-type: none"> Current Australian driver's licence with your photograph and signature or equivalent from a foreign country. Current[^] Passport[#], showing your name, date of birth, photograph and signature. 	<p>OR</p>	<p>List B</p> <ul style="list-style-type: none"> Birth certificate or birth extract. Citizenship certificate issued by the Commonwealth. Pension card issued by Centrelink that entitles the person to financial benefits. <p>List C</p> <ul style="list-style-type: none"> Notice issued by Commonwealth, State or Territory, no older than 12 months, that contains your name and residential address and records the provision of financial benefits under the law of the Commonwealth, State or Territory. For example, letter from Centrelink. Notice issued by the Australian Taxation Office, no older than 12 months, that contains your name and residential address and records a tax debt payable to or by you. For example, notice of assessment from ATO. Notice issued by a local government body, no older than 3 months, that contains your name and residential address and records the provision of services to you. For example, rates notice from local council.
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[^]The sole exception to the expired document rule is a passport. An expired passport is a valid identification document provided it has been expired for less than two years.

[#]If your passport or birth certificate/extract is not in English, it must be accompanied by an English translation prepared by an accredited translator. If your passport is not an Australian passport it must include your signature.

2. FIND SOMEONE TO CERTIFY YOUR DOCUMENTS

The following people can certify copies of your original documents as **true and correct** copies:

- A permanent employee of Australia Post with five or more years of continuous service who is employed in an office supplying postal services to the public
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- A police officer
- A Justice of the Peace
- A judge of court
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- A notary public
- A registrar or deputy registrar of a court
- An Australian consular officer or an Australian diplomatic officer
- A magistrate
- A Chief Executive Officer of a Commonwealth court

3. HOW TO CERTIFY YOUR DOCUMENTS

All copied pages of **original** proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so.

The authorising person must sight the original document and include the following details on the copies:

- Stamp or write "I certify this is a true copy of the original document" on each page

Followed by their:

- Printed name
- Signature
- Qualification (eg Justice of the Peace) and
- Date



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

Julie Preston

*Justice of the Peace
26/2/10*

4. CHANGE OF NAME OR SIGNING ON BEHALF OF THE APPLICANT

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	Marriage certificate, deed poll or change of name certificate from Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Western Australian Enduring Power of Attorney

If your Enduring Power of Attorney was made interstate or overseas you need to obtain an order from the Western Australian State Administration Tribunal to confirm your power of attorney can be used in Western Australia.