Holden Employees Superannuation Fund
Contributions Splitting Application

Before completing this form please read the factsheet “Splitting super contributions in the Holden Employees Superannuation Fund” available from the Fund Helpline on 1800 700 995 or refer to the fund’s website www.holdensuper.com.au.

Please note: Contribution splitting only applies to your Voluntary Additional Contributions that you made on a salary sacrifice basis and Supplementary Superannuation Contributions. It does not apply to the defined benefit component of your benefit or to amounts rolled into the Fund.

Step 1 – Complete your personal details

<table>
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<th>Title</th>
<th>Date of birth</th>
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<tr>
<td>Mr</td>
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<tr>
<td>Mrs</td>
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<td>Ms</td>
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<tr>
<td>Miss</td>
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<td>Other</td>
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</tbody>
</table>

Given names

Surname

Previous name (if applicable)

Postal address

Suburb

State

Postcode

Daytime telephone

Mobile

Email

Member number

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

Step 2 – Attach documentation if your personal details have changed

Name and date of birth changes – see the “Completing proof of identity” fact sheet on the fund’s website www.holdensuper.com.au.
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.

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### Step 3 – Personal details of spouse receiving your contributions

| Title   | Mr ☐ | Mrs ☐ | Ms ☐ | Miss ☐ | Other ☐ | Date of birth ☐/☐/☐
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<td>Fund ABN number*</td>
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<td></td>
<td>Unique Superannuation Identifier (USI)*</td>
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<td>Membership or Policy number*</td>
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**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.

- Member number
- Fund name
- Fund address
- Telephone
- Fund ABN number* Unique Superannuation Identifier (USI)*
- Membership or Policy number*

**If exempt from an ABN, tick the reason for exemption:**

- Exempt Public Sector Super Scheme ☐
- Retirement Savings Account ☐

Cheque to be made in favour of

Note: You can only split contributions to an active super account held in the name of your spouse in a complying super fund. If your spouse does not have an active super account the trustee will not be able to process your request.

* A transfer to another fund cannot occur without the ABN and USI or membership/policy number of your spouse’s fund. If your rollover fund does not have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance. Your spouse’s super fund can help you complete these details.
Step 4A – What form of identification will you need to provide?
This section will only apply if you are transferring contributions to your spouse’s account in another complying superannuation fund. If you are transferring to a Self Managed Super Fund – refer to Step 4B.

If transferring contributions to your spouse’s account in another complying superannuation fund:

○ Option 1 – use your Tax File Number (TFN)

The Holden Employees Superannuation Fund might already hold your TFN. If you’re not sure if you have previously provided it, you can choose to do so now. You do not have to provide your TFN, but if you do, this will ensure that any benefit you take from the Holden Employees Superannuation Fund does not incur additional tax. Please also refer to the information provided below under Providing your Tax File Number (TFN).

Enter your TFN here

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By providing your TFN, you are authorising us to give this information to your other super fund.

Please note: We will validate your TFN and personal details with the Australian Tax Office. If we cannot confirm an exact match with the ATO’s records, you will be required to provide a copy of either your current driver’s licence or passport (see below) and your payout will be delayed.

○ Option 2 – provide a copy of either your current driver’s licence or passport

Your driver’s licence must NOT be expired. However, your Australian passport can have expired within the last 2 years.

If you don’t have a current driver’s licence or passport, you can refer to the “Completing Proof of Identity” fact sheet on the fund’s website at www.holdensuper.com.au for a list of other documents that can be used to identify you. You can also contact the Fund Helpline on 1800 700 995 for assistance.

Step 4B – Identification required if transferring contributions to your spouse’s account in a Self Managed Super Fund

If you would like to transfer contributions to your spouse’s account in a Self Managed Super Fund, you will need to provide certified ID. The easiest way to do this is to:

• Photocopy both sides of your current driver’s licence or passport
• Take the photocopies to Australia Post or your local Police Station and ask them to certify your ID document.

Your driver’s licence must NOT be expired. However, your Australian passport can have expired within the last 2 years.

The person certifying your ID documents will include the following details on the copies:

Certified true copy
J. Sample
Mr John Sample
Justice of Peace
Registration No. 123456789
Date: 01/03/2015

A clear copy of the document that identifies you (i.e. your driver’s licence (front and back) or passport)
Write or stamp ‘certified true copy’ of the original document
The authorised person’s signature
Full name, qualification and registration number (if applicable) of the authorised person
Date of certification (within 12 months of receipt)

If you don’t have a current driver’s licence or passport, you can refer to the “Completing Proof of Identity” fact sheet on the fund’s website at www.holdensuper.com.au for a list of other documents that can be used to identify you. You can also contact the Fund Helpline on 1800 700 995 for assistance.

PROVIDING YOUR TAX FILE NUMBER (TFN)

There may be tax implications if you have not yet provided, or choose not to provide, your TFN. Whilst it is not compulsory to provide your TFN, not doing so could cost you in the following ways:

• you may have paid more tax than necessary on super contributions made for you by your employer (including SG, salary sacrifice and other contributions) in this financial year. This additional tax can be reversed if you provide your TFN to the fund before the end of the financial year, or your earlier payment from the fund. Although you may be able to claim back this additional tax if you later provide your TFN, time limits and other rules may apply, which may affect the size of any refund.

• you may pay additional tax on your super payout. However it might be possible to claim this back when lodging your tax return.

• you may miss out on any government Super Co-contributions for which you may be eligible; and

• you may have difficulty locating your super in the future, should you lose contact with your fund(s).

If you are uncertain as to whether or not you have provided your TFN, you can check these details on the fund’s website www.holdensuper.com.au or contact the Fund Helpline on 1800 700 995.
Step 5A – Contributions splitting details

The contributions I would like to split with my spouse are contributions made to my super account during the previous financial year ended 30/06/ [YEAR].

Write the amount or percentage that your spouse is to receive. It cannot be more than 85% of the contributions you made in this category or more than your concessional contributions cap for the financial year. From 1 July 2019, the concessional contributions cap may be increased above the general concessional cap if you are eligible. To be eligible you must make concessional contributions in excess of the general concessional cap, have a total superannuation balance less than $500,000 immediately prior to the financial year, and have unused concessional cap space from the previous 5 years (with 2018–19 financial year being the first year you can accrue unused concessional contributions). Your concessional contributions cap will equal the general concessional cap plus the previously unused concessional contributions made in excess of the general concessional contributions cap. Your increased concessional contributions cap will be used to determine the maximum amount of taxed splittable contributions.

Eligible concessional contributions to be split:
(i.e. Supplementary Contributions and Voluntary Additional Contributions made on a salary sacrifice basis)

(tick one circle only) ✓

- Dollar Amount (enter amount and tick whether net or gross of tax*)
  
  $ [enter amount] NET or GROSS

OR

- Percentage (enter percentage and tick whether net or gross of tax*)
  
  [% enter percentage] NET or GROSS

* 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 previous financial year can be split. The total contributions amount nominated cannot exceed a maximum of the total concessional contributions made to your account during the financial year or your concessional contribution cap** (whichever is the lesser).

If you nominate an amount greater than your legislated concessional contribution cap the amount transferred will be reduced accordingly.

** For details of the applicable caps, refer to the information sheet on contribution caps for your section of membership, available on the fund website on the Documents & forms page.
If you are withdrawing your entire superannuation benefit from the Holden Employees Superannuation Fund 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 “Payment Instructions” form.
Write the amount or percentage that your spouse is to receive. It cannot be more than 85% of the contributions you made
in this category or more than your concessional contributions cap for the financial year. From 1 July 2019, the concessional
contributions cap may be increased above the general concessional cap if you are eligible. To be eligible you must make
concessional contributions in excess of the general concessional cap, have a total superannuation balance less than $500,000
immediately prior to the financial year, and have unused concessional cap space from the previous 5 years (with 2018–19
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of taxed splittable contributions.

Eligible concessional contributions to be split:
(i.e. Supplementary Contributions and Voluntary Additional Contributions made on a salary sacrifice basis)
(tick one circle only)
☐ Dollar Amount (enter amount and tick whether net or gross of tax*)
$  
□ NET or □ GROSS

OR
☐ Percentage (enter percentage and tick whether net or gross of tax*)
%  
□ NET or □ GROSS

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or your concessional contribution cap** (whichever is the lesser).
If you nominate an amount greater than your legislated concessional contribution cap, the amount transferred will be
reduced accordingly.

** For details of the applicable caps, refer to the information sheet on contribution caps for your section of membership, available on the fund website on the
Documents & forms page.
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 payment instructions in Step 3, 5A and 5B?
☐ Your spouse has signed and dated the declaration (Step 6)?
☐ Signed and dated the form (Step 8)?
☐ Select the proof of identification you have provided – Step 4a or Step 4b
   ☐ Use your Tax File Number
   ☐ Copy of current driver's licence OR passport
   ☐ Certified copy of current driver's licence OR passport
☐ Is your identification current? If providing an Australian passport, one that has expired within the last two years is acceptable.
☐ Are you transferring contributions to your spouse’s account in a Self Managed Super Fund? If so, you have attached certified proof of identity documents – Step 4b.

If you need help, please refer to the “Completing proof of identity” fact sheet on the fund’s website at www.holdensuper.com.au or call the Fund Helpline on 1800 700 995.
I request that the trustee of the Holden Employees Superannuation Fund splits the contributions detailed in Steps 5A and/or 5B to the superannuation account of my spouse as detailed in Step 3.

By signing this form I acknowledge that I have read and understood the fact sheet ‘Splitting super contributions in the Holden Employees Superannuation Fund’ and the Privacy Statement above and I understand and agree 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 the Holden Employees Superannuation Fund will be taken from my benefit components in the following order: preserved, restricted non-preserved, unrestricted non-preserved.
- 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 the Holden Employees Superannuation Fund will decrease by the amount transferred out of the Holden Employees Superannuation Fund in accordance with this contributions split request.
- there may be a delay in payment if my details have changed.
- my personal information will be collected, used and disclosed in the manner described in the Privacy Statement in this document.

I declare that the information provided on this form is correct and confirm that the amount to be split is within the legislatively specified limits.

I confirm that the person nominated as the receiving spouse in Step 3 is an eligible spouse, as defined in Step 6.

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

Signature ✗ Date 08/08/2023

The trustee of Holden Employees Superannuation Fund recommends that you seek advice from a licensed, or appropriately authorised, financial advisor regarding your super before you make any decision in relation to contributions splitting.

Please return your completed form together with your proof of identity to the Holden Employees Superannuation Fund, GPO Box 4303, Melbourne VIC 3001.