Contributions Splitting Application
SA Metropolitan Fire Service Superannuation Scheme

Before completing this form please read the factsheet ‘Splitting super contributions in SA Metropolitan Fire Service Superannuation Scheme’ available from the Manager on (08) 8204 3826 or refer to the website www.samfs.superfacts.com.

Step 1 – Complete your personal details

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Mr</th>
<th>Mrs</th>
<th>Ms</th>
<th>Miss</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given names</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surname</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous name (if applicable)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal address</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suburb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Postcode</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daytime telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member number</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name of your employer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 website www.samfs.superfacts.com.

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 – Personal details of spouse receiving your contributions

<table>
<thead>
<tr>
<th>Title</th>
<th>Mr ☐</th>
<th>Mrs ☐</th>
<th>Ms ☐</th>
<th>Miss ☐</th>
<th>Other ☐</th>
<th>Date of birth</th>
<th>/</th>
<th>/</th>
<th>/</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given names</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surname</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal address</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suburb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>State</td>
<td>Postcode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daytime telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Mobile</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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**

☐ 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. Please ensure the fund address is up-to-date on the ATO’s website [www.superfundlookup.gov.au](http://www.superfundlookup.gov.au)

**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.

Your spouse may have the option of joining SA Metropolitan Fire Service Superannuation Scheme. For details, including a copy of the Member Benefit Guide, contact the scheme on (08) 8204 3826.

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

Option 1 – use your Tax File Number (TFN)

SA Metropolitan Fire Service Superannuation Scheme 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 SA Metropolitan Fire Service Superannuation Scheme does not incur additional tax. Please also refer to the information provided below under Providing your Tax File Number (TFN).

Enter your TFN here

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 scheme’s website at www.samfs.superfacts.com for a list of other documents that can be used to identify you. You can also contact the Manager on (08) 8204 3826 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 drivers 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
- 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 scheme’s website at www.samfs.superfacts.com for a list of other documents that can be used to identify you. You can also contact the Manager on (08) 8204 3826 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 scheme before the end of the financial year, or your earlier payment from the scheme. 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 scheme(s).

If you are uncertain as to whether or not you have provided your TFN, you can check these details on the scheme’s website www.samfs.superfacts.com or contact the Manager on (08) 8204 3826.
## 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).  

**Eligible concessional contributions to be split:**  
(e.g. deductible contributions such as employer and salary sacrifice contributions)  
(tick one circle only) ✓

- **Maximum allowed**
- **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

* 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 the concessional contribution cap **(whichever is the lesser).**

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

** Refer to the ‘Contributions splitting fact sheet’ on the www.samfs.superfacts.com or call the Manager on (08) 8204 3826 for details.

## Step 5B – Contributions splitting details for exiting members  
(only complete this section if you are leaving SA Metropolitan Fire Service Superannuation Scheme)

If you are withdrawing your entire superannuation benefit from SA Metropolitan Fire Service Superannuation Scheme 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.

**Eligible concessional contributions to be split:**
(e.g. deductible contributions such as employer and salary sacrifice contributions)  
(tick one circle only) ✓

- **Maximum allowed**
- **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

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

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

** Refer to the ‘Contributions splitting fact sheet’ on the www.samfs.superfacts.com or call the Manager on (08) 8204 3826 for details.
To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the scheme. 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

If your identification is 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 Scheme? 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 scheme’s website at www.samfs.superfacts.com or call the Manager on (08) 8204 3826.
I request that the trustee of SA Metropolitan Fire Service Superannuation Scheme 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 SA Metropolitan Fire Service Superannuation Scheme’ 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 SA Metropolitan Fire Service Superannuation Scheme will be taken from the preservation components in the following order: preserved, restricted non-preserved, unrestricted non-preserved
• the withdrawal fee (if any) will be deducted from my member account when the contributions split is made to my spouse. If I am withdrawing my entire superannuation benefit, this fee will only be charged once
• if the contributions nominated to be split exceed the maximum allowed by the legislation or the scheme’s rules, my nominated transfer amount will be reduced to the maximum allowable amount
• the value of my super in SA Metropolitan Fire Service Superannuation Scheme (including any Death and Total and Permanent Disablement benefits) will decrease by the amount transferred out of SA Metropolitan Fire Service Superannuation Scheme in accordance with this contributions split request
• there may be a delay in payment if my details have changed
• I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

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

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

Signature ✗ Date □□ / □□ / □□□□

The trustee of SA Metropolitan Fire Service Superannuation Scheme 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 and supporting documentation to the Scheme Administrator, SA Metropolitan Fire Service Superannuation Scheme, GPO Box 4303, Melbourne, VIC 3001.