

# Application for contribution splitting

This form is for members of the LGS Accumulation Scheme

Please complete this form if you want to split your concessional (pre-tax) contributions in the LGS Accumulation Scheme with your spouse.

Please use a black pen and CAPITAL letters or type directly into this form online, print it, sign it and send it to us. Use (✖) to mark boxes.

Before completing this form, please ensure you read the relevant Product Disclosure Statement (PDS) available at [lgsuper.com.au/PDS](http://lgsuper.com.au/PDS)

## What contributions can be split?

- Employer contributions
- Amounts paid by the ATO relating to a superannuation guarantee amount or from the superannuation holding account's special reserve
- Allocated surplus contribution amounts.

### IMPORTANT

- You cannot split your non-concessional contributions.
- You cannot apply to split your contributions if your account balance after the split is less than \$5,000.

## 1. Your details

Member no.             Date of birth       Title  eg. Mr

Given name/s

Family name

Email address

Phone (home)  Phone (work)

Phone (mob)

### Postal address

No./Street

Suburb/Town  State/Territory    Postcode

Residential address  select if same as postal address above

No./Street

Suburb/Town  State/Territory    Postcode

## 2. Contributions splitting details

Financial year ending 30 June

### Concessional (pre-tax) splittable contributions

MAX  OR % of net amount available  %

## 3. Applicant request and declaration

I request that the contributions stated above are split to my spouse's superannuation account as detailed overleaf. I have fully read the important notes, the relevant PDS and/or fact sheet and confirm that the information provided is true and correct.

Name

Signed

Date

## 4. Receiving spouse details

Date of birth    Title

Given name/s

Family name

Email address

Phone (home)  Phone (work)

Phone (mob)

**Postal address**

No./Street

Suburb/Town  State/Territory    Postcode

**Residential address**  select if same as postal address above

No./Street

Suburb/Town  State/Territory    Postcode

LGS is authorised to collect your tax file number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. We will treat it as confidential and only use it for lawful purposes. This includes disclosing it to another super fund when we're arranging a transfer of funds for you.

You are not obliged to disclose your TFN, but there may be implications if you don't.

Without it, your contributions may be taxed at a higher rate and LGS cannot accept after-tax contributions from you.

## 5. Receiving spouse tax file number (TFN)

My TFN is:

### If you do not provide your TFN:

- your contributions may be taxed at the highest rate plus Medicare levy
- you will not be able to make personal contributions to your super fund
- we may not be able to receive contributions from you or your employer
- it may be more difficult for you to monitor your account or to locate it if you lose track of it.

## 6. Fund membership of receiving spouse

### Is your spouse currently a member of Local Government Super?

Yes, please provide their membership number:

Please go straight to **Section 10. Receiving spouse declaration**.

No, please create a new membership in the LGS Accumulation Scheme (you should refer to the LGS Accumulation Scheme PDS before choosing this option). Please complete **Section 8. Receiving spouse investment options** and **Section 10. Receiving spouse declaration**.

No, please pay the split amount to the external fund nominated in **Section 7. External fund details to pay split amount**.



## 9. Proof of identity

You have two options to prove your identity. Check the box to make your selection.

### Option 1: Use electronic verification

By providing my Medicare card, driver's licence or Australian passport details below, I authorise the use of my personal details (including the information below) for the purpose of electronic data verification using reliable and independent data sources. I understand LGS uses a third party system for this purpose.

**Important:** Make sure the details you provide are accurate. If your personal details provided do not match your electronic identification details, we will not be able to use your personal details to prove your identity, which will delay processing your request.

You **MUST** provide details of at least two of the following documents:

#### Document 1: Medicare card

Full name as shown on your Medicare card, including initials:

Card number:

Valid to: / /  I am person number  on this card

#### Document 2: Australian driver's licence

First name as shown on your licence:

Last name as shown on your licence:

Australian driver's licence number:

Expiry date: / /

#### Document 3: Australian passport

Given name/s (including middle name) as shown on your passport:

Last name as shown on your passport:

Australian passport number:

Country of birth (not shown on passport):

Family name at birth (not shown on passport):

Signature

Date / /

### Option 2: Provide certified copies of identification documents

I have attached copies of my certified proof of identity with this form.

Please ensure that you provide photocopies of your original documents and they are correctly certified.

Signature

Date / /

### CERTIFIED DOCUMENTS

A certified copy is a photocopy of the original document that has been sighted and signed by an authorised person as a true representative of the original. Please refer to the LGS *Proof of Identity* fact sheet for a comprehensive list of who can certify your ID.

For more information on what is required when supplying certified proof of identity, please see the *Proof of Identity* fact sheet available to [lgsuper.com.au](http://lgsuper.com.au)

## 10. Receiving spouse declaration

### I declare that at the date of this application:

- I am aged less than my preservation age; OR
- I am aged between my preservation age and 65 years and have not retired from the workforce.

### If I am joining as a new member, I also declare that:

- I understand that the PDS is a general guide and does not constitute investment advice.
- I understand that the Trustee is not liable for my choice of investment option(s) and that professional financial advice may assist me in making my decision.
- I understand that I may change my investment option(s) at any time and that the investment switching fee outlined in the PDS is applicable to all investment switches I request.
- If opening a new account, I agree to the opening of an LGS Accumulation Scheme account in my name and certify that the information provided in Section 4 is correct.
- I have fully read the important notes, the relevant PDS and/or fact sheet.
- The information completed is true and correct.
- I have read the Privacy Collection Statement and understand how LGS will use the personal information provided on this form.
- I authorise the use of my personal details for the purpose of electronic data verification of my identity using reliable and independent data sources. I understand LGS uses a third party system for this purpose.

Name

Signed

Date

## Please return your completed form to:

Mail: Local Government Super  
PO Box N835  
Grosvenor Place NSW 1220

Email: [admin@lgsuper.com.au](mailto:admin@lgsuper.com.au)

### Privacy Collection Statement

The information provided on this form is collected by LGSS Pty Limited (ABN 68 078 003 497) as Trustee for Local Government Super (ABN 28 901 371 321) for the purposes of administering accounts and providing services to you associated with fund membership. If you do not provide the requested information, LGS may not be able to perform these tasks. Your personal information may be shared with our administrator, other superannuation trustees and other services providers, in order to be able to provide our services to you. We may provide information to government, regulatory or other bodies if required by law. Our privacy policy provides more information about how we manage and protect personal information. It sets out how you can access and correct the information that LGS holds about you, how you can complain about a breach of privacy and our process for resolving privacy related enquiries and complaints.

For further information, visit [lgsuper.com.au/privacy-policy](http://lgsuper.com.au/privacy-policy) or call us on 1300 LGSUPER (1300 547 873).

Issued by LGSS Pty Limited (ABN 68 078 003 497) (AFSL 383558), as Trustee for Local Government Super (ABN 28 901 371 321).

Enquiries Phone: 1300 LGSUPER (1300 547 873), 8.30am–5.00pm, Monday to Friday Web: [lgsuper.com.au](http://lgsuper.com.au)