

Private Super Fund Contribution Splitting form

Section 2: Receiving spouse details

Please select (✓) the receiving spouse's superannuation provider

the Private Super Fund, please receipt this rollover to the following account:

Name of the Private Super Fund

Fund number

Member account number

Spouse's surname

Spouse's given name(s)

another superannuation fund, please receipt this rollover to the following fund:

Name of the superannuation fund

Membership number

Fund ABN

 - - -

Fund SPIN

Fund address

Suburb

State

Postcode

Section 3: Financial adviser details

Financial adviser's dealer group

Financial adviser's name

Financial adviser's contact number

Private Super Fund Contribution Splitting form

Section 4: Receiving spouse declaration

I request the above nominated contributions be paid to a superannuation account in my name, I declare that at the date of this application I am:

- the spouse of the applicant and
- aged less than my preservation age or
- between my preservation age and 65 years and have not retired from the work force.

Name

Signature

Date

 / /

Section 5: Applicant declaration

I authorise for the above nominated contributions to be split to my spouse's superannuation account, I declare that all information provided in this form is correct and sufficient funds are in my operating cash account to process this request.

Name

Signature

Date

 / /

Please return to Australian Executor Trustees Limited by:

Fax 1800 781 166
 Email forms@aetlimited.com.au
 or Post Australian Executor Trustees Limited
 Administration Services
 GPO Box 546
 Adelaide SA 5001

Private Super Fund Contribution Splitting form

Completing proof of identity

You will need to provide documentation with this split request to prove you are the person to whom the superannuation entitlements belong.

Acceptable documentation

Either one of the following documents may be used:

- driver's licence issued under State or Territory law

OR

- passport

Other acceptable forms of identification are either one of the following:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits

AND

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address
For example Tax Office Notice of Assessment or Rates notice from local council

Have you changed your name or are signing on behalf of another person?

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 documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

Certification of personal 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 person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- 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 notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or a Chief Executive Officer of a Commonwealth court.

Australian Executor Trustees is bound by the National Privacy Principles. More information about privacy matters can be found in the current Product Disclosure Statement for your product. If you would like a copy of the Privacy Policy or have any questions in relation to privacy, please contact us on 08 8127 1900 and ask for the Privacy Officer.

Australian Executor Trustees Limited ABN 84 007 869 794 AFSL No 240023 RSE Licence No L0002554

Part of Australian Wealth Management