

Contribution Split Form

B02



right by your side

Use this form to advise Brighter Super to split your contributions with your partner.

Brighter Super must receive this form before **31 May** to split contributions for the previous financial year. For more information on contribution splitting see our *Super for your partner* info sheet available online at brightersuper.com.au.

Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Member number	Title	Given name/s		
Surname		Date of birth		/ /
Email		Phone number		
Residential address				
Suburb/town		State	Postcode	
Postal address (if different to above)		State	Postcode	Tax file number (TFN) ¹

¹ For more information on providing your TFN please read the Important information located on page 5.

1 Verifying your identity

If you want to split your contribution you will need to verify your identity by choosing **option A or B**:

Option A

- Electronic verification
Please provide details of your driver licence or passport below:
- I authorise Brighter Super to use information held by a credit reporting agency to assist in verifying my identity online. **I understand this is not a credit check and will not be stored on my credit file.** I confirm I have read the *Proof of Identity requirements* info sheet available on the Brighter Super website brightersuper.com.au.

Licence details

Licence number
State of issue
Card number ²

Passport details

Passport number (Australian passport only)
Family name at birth
Place of birth (as shown on your passport)

² All members are required to provide their card number when verifying their identity electronically using their driver licence details. For more information please read the *Proof of identity information* on page 5

OR

Option B

- Certified Identification

Please read the *Proof of identity* information on page 5

T 1800 444 396

E benefits@brightersuper.com.au

W brightersuper.com.au

P GPO Box 264 Brisbane Qld 4001

This document has been prepared and issued by Brighter Super Trustee (ABN 94 085 088 484 AFS Licence No. 230511) (Trustee) as trustee for Brighter Super (ABN 23 053 121 564) (Fund). Brighter Super may refer to the Trustee or the Fund as the context may be. Brighter Super products are issued by the Trustee on behalf of the Fund

2 Contributions splitting details

I would like to split the following taxed contributions into my spouse's account for the:

- Current financial year OR Previous financial year
- Maximum amount OR Other amount \$,,

Please note: You can only split contributions for the current financial year if you are closing your Brighter Super account. A minimum of \$500 must be contributed and a maximum amount may be capped to ensure account balance does not fall below \$8,000.

If your total concessional contributions exceed the concessional cap, are you using eligible carry forward contributions?

- Yes No

3 Receiving spouse details

Given name/s	Surname	Member number (if applicable)	
Email	Phone number		
Residential address			
Suburb	State & Postcode	Tax file number (TFN)³	Date of birth / /

³ For more information on providing your TFN please read the Important information located on page 5.

I would like to:

- Open a Brighter Super account.**
You should read the *Product Disclosure Statement* available from our website for more details on how this account works and join at Member Online. Your money will be invested in the default option.
- Transfer to another superannuation fund.**
Complete section 4 or 5 & 6. We are required to verify your identity if you are transferring your benefit to a self-managed superannuation fund. Please read the Proof of Identification section on page 4.
- Contribute to an existing Brighter Super account** (to the member number recorded in section 3).
Your money will be invested in the default option unless you have previously selected a preference for future contributions. You can change the way your account is invested at Member Online.

4 Transfer my benefit to another super fund

Please select (✓) the appropriate option below:

- Partial transfer amount: \$,,
(A minimum balance of \$8,000 must remain in your account)
- Full contribution split amount.

Any insurance cover attached to your account will be cancelled if you transfer the full amount of your benefit.

Other fund details - Mandatory

Fund name	Member number
Unique Superannuation Identifier (USI)	Australian Business Number (ABN)

To transfer your benefit to another fund you must complete this section in full. You will need to provide us with sufficient information in Section 1 to verify your identity before we can process your transfer.

5 Transfer funds to my Self Managed Super Fund (SMSF)

Please read our *Benefit payment policy* in the Important information section on page 5.

Any insurance cover attached to your account will be cancelled if you transfer the full amount of your benefit. Your transfer will not be processed until the status and details of your SMSF are verified using the government SMSF verification service (SVS).

The details provided below must be an **exact match to the full SMSF details registered with the Australian Taxation Office (ATO)**. We will be unable to process any rollovers to a SMSF where the details you have provided do not match the details registered with the ATO. If this happens you will need to confirm with the ATO the details you have provided to Brighter Super are correct or ensure your details are updated with the ATO.

To avoid potential delays you can confirm the membership details of your SMSF (address, fund name, ESA, ABN etc) by calling the ATO or accessing the Australian Business Register online (available to SMSFs registered for online services).

Your transfer will be processed once the status and details of your SMSF are successfully verified.

Please select (✓) the appropriate option below:

Partial transfer amount: \$, ,

(A minimum balance of \$8,000 must remain in your account)

Full contribution split amount.

Please note: To enable us to transfer the funds you must provide the details for your SMSF and complete section 6.

SMSF details

SMSF name (case sensitive)	Member number
Australian Business Number (ABN)⁴	Electronic Service Address (ESA)
Fund address	

To transfer your benefit to a SMSF, you must complete this section in full. You will need to provide us with sufficient information in section 1 to verify your identity before we can process your transfer.

To minimise the chance of delays in processing your payment please ensure you have provided the correct details above and tick (✓) the following declarations to confirm.

I have checked the above details and confirm they are an **exact** match to the details held by the ATO and failure to provide matching details will result in my transfer request being delayed.

6 Self Managed Super Fund (SMSF) bank account details

It is your responsibility to ensure your bank details are correct and that you are the holder of the account. Brighter Super will not be liable for any errors that occur based on the account details you provide. Payments cannot be made to third parties or non-Australian bank accounts. You must provide us with sufficient information to verify the bank account details provided is for your SMSF. **Please provide a copy of the portion of the SMSF bank statement that shows the full name and account details (balance and transaction details are not required).**

BSB number	Account number	Account name
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I have attached the relevant portion of my bank statement to verify the new bank details

Note: the account name on the bank account must incorporate you SMSF fund name. If we are unable to link the account name to your SMSF, you will need to provide additional evidence to confirm the link between the fund and bank account.

4. Legislation requires you to provide us with your SMSF fund ABN, we are unable to accept an ACN.

7 Receiving spouse declaration

You are only able to receive split concessional contributions while you are under age 65. If you have reached your preservation age and permanently retired or have met another condition of release you are unable to receive a contribution split.

Please confirm the below (✓):

- I am under preservation age
- I am between preservation age and 64 and have not permanently retired

By signing this form:

- I certify the information I have provided is true and correct.
- I certify at the time of making this request, my partner and I live together on a permanent and genuine domestic basis, in a relationship as a couple.
- I have read and understood the *Super for your partner info sheet* and the *Product Disclosure Statement*.

Signature _____	Date signed / /
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8 Contributing member declaration

- I certify the information I have provided is true and correct.
- I certify at the time of making this request, my partner and I live together on a permanent and genuine domestic basis, in a relationship as a couple.
- I have read and understood the *Super for your partner info sheet* and the *Product Disclosure Statement*.

Signature _____	Date signed / /
---------------------------	---------------------------

7 Power of Attorney Signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member's attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member's Power of Attorney document and are authorised to act on the member's behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

Attorney 1 _____	Signature _____	Date signed / /
Attorney 2 _____	Signature _____	Date signed / /
Attorney 3 _____	Signature _____	Date signed / /
Attorney 4 _____	Signature _____	Date signed / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures for attorney/s

Now you have completed this form and signed the declaration, please send it to us by:

Preferred Method

Website (Secure file upload)
brightersuper.com.au/contact-us

Alternative Options

Email (scanned copy)
benefits@brightersuper.com.au

Post Brighter Super
GPO Box 264
Brisbane Qld 4001



Important information

1. Tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, Brighter Super is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. Brighter Super may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request to the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- Brighter Super will be able to accept all types of contributions to your account/s
- other than the tax that may ordinarily apply, the tax on contributions to your superannuation account/s will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

More information on Tax File Numbers for superannuation purposes can be obtained from the ATO on 13 10 20.

2. Privacy and personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website brightersuper.com.au.

3. Proof of identification requirements

Australian government legislation requires you to provide us with proof of identification if you are transferring your benefit to your partner's super fund.

To prove your identity, you can provide us with sufficient information to verify your identity electronically or send us an original certified copy of your current driver licence or passport.

From November 2022 all members will be required to supply their driver licence **card number** in addition to their licence number if they wish to have their identity verified electronically.

Your card number is a unique identifier which is updated each time a driver licence is re-issued. Including the card number when verifying your identity ensures that the document being presented is the most recently issued document and this will minimise the risk of identity theft using a stolen or lost driver licence.

The position of the card number is different for each State and Territory although it is commonly located on the back of your licence.

Read the *Proof of identity requirements* information at brightersuper.com.au for more information.

Preservation age table

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60