

Step 5 – Sign the form (member to complete)

I request that the trustee of Equipsuper splits the contributions detailed in Steps 4A and/or 4B to the superannuation account of my spouse as detailed in Step 3.

By signing this form I acknowledge that I have read and understood *Fact Sheet #29 - Splitting your super contributions* and I understand that:

- any contributions made to my defined benefit account cannot be split
- 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 Equipsuper 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 and paid to an external fund
- if the contributions nominated to be split exceed the maximum allowed by the legislation or the Fund's rules, my nominated split amount will be reduced to the maximum allowable amount
- the value of my super in Equipsuper (including any death and total and permanent disablement benefits) will decrease by the amount transferred out of Equipsuper in accordance with this contributions split request
- the information contained in this form will be used by the trustee to process my contributions split request. For this purpose, the information may pass between the trustee of Equipsuper and its administrator, my employer and other parties as required, including the trustee of the fund to which the contributions are transferred, and I consent to the handling of my personal information in this way
- acknowledge that if I've provided my email address details and/or mobile number in this form, the Trustee may, at its discretion, use that email address and/or mobile number to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means

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

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

Signature

Date / /

Step 6 – Receiving spouse declaration (spouse to complete)

I declare that at the date of this application I am the receiving spouse* of the applicant and I:

- am aged less than 55 years; OR
- am aged between 55 and 65 years and I have not retired from the workforce.

I understand that:

- The information contained in this form will be used by the trustee to process this contributions split request. For this purpose, the information may pass between the trustee of Equipsuper and its administrator and other parties as required, including the trustee of the fund to which the contributions are transferred, and I consent to the handling of my personal information in this way.

Signature

Date / /

*A spouse is a person:

- who is legally married to the member;
- with whom the member lives on a genuine domestic basis in a relationship as a couple (including a same-sex partner); or
- with whom the member is in a registered relationship under a law of State or Territory (including a same-sex partner).

Note: This section must be completed by the receiving spouse in order for the trustee to process the contributions splitting request.

The trustee of Equipsuper recommends that you seek advice from a licensed, or appropriately authorised, financial adviser 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 Equipsuper, GPO Box 4303, Melbourne, VIC 3001.



Completing proof of identity

What you need to provide before your payment can be processed

Primary Photographic Identification

You will need to provide a **certified** copy of **one** of the following primary identification documents:

- Current Australian or foreign driver's licence containing a photo, address and signature
- Australian passport containing a photo and signature that is current or expired within the last two years
- Current foreign passport, or similar document issued for the purpose of international travel, containing a photo and signature
- Current card issued under a State or Territory for the purpose of proving a person's age, including a photo
- Current national identity card issued by a foreign government for the purpose of identification, containing a photo and signature

Secondary Identification

If you are unable to provide any primary identification, you will need to provide a certified document from each of the following lists:

Provide ONE of the following primary non-photographic identification documents:

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

AND

ONE of the following secondary identification documents containing your name and residential address:

- letter from Centrelink (or other Government body) within the past twelve months regarding a Government assistance payment
- Tax Office Notice of Assessment issued within the past twelve months
- rates notice from local council issued within the past three months
- electricity, gas or water bill issued within the past three months

What is a certified copy?

The copy of the identification document provided **MUST be certified** as a true and correct copy by a person authorised to do so. Please see below for information on how to, and who can, certify documents.

How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- Written or stamped 'certified true copy'
- Signature and printed name
- Date (the date of certification must be within twelve months prior to the date the form is received by us)
- Qualification (such as Justice of the Peace, Australia Post employee, etc).

Who can certify documents in Australia

Any one of the following authorised persons can certify documents as being true and correct copies:

1. A person who is currently licensed or registered under a law to practice in one of the following occupations:

Chiropractor	Dentist	Legal practitioner	Medical practitioner
Nurse	Optometrist	Patent attorney	Pharmacist
Physiotherapist	Psychologist	Trade marks attorney	Veterinary surgeon

2. A person enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner

3. A person on the following list:

- **Australia Post Permanent Employee or Agent** (who is currently employed with the post office & has at least two continuous years of service or is in charge of supplying postal services to the public)
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank Officer, Building Society Officer or Credit Union Officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Justice of the Peace**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)

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Completing proof of identity

- **Member of Chartered Secretaries Australia**
 - **Member of Engineers Australia** (other than at the grade of student)
 - **Member of the Association of Taxation and Management Accountants**
 - **Member of the Australasian Institute of Mining and Metallurgy**
 - **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
 - **Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants**
 - **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
 - **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
 - **Notary Public**
 - **Australia Post Permanent Employee** (who is currently employed with the post office and has at least two continuous years of service)
 - **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority with two or more years of continuous service**
 - **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
 - **Police Officer or Sheriff**
 - **Teacher employed on a full-time basis at a school or tertiary education institution**
 - **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
 - **Court Officer:**
 - Registrar or Deputy Registrar of a Court
 - Judge
 - Clerk
 - Magistrate
 - Master of a Court
 - Chief Executive Officer of a Commonwealth Court
- 4. Officer with, or Authorised Representative of an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)

Who can certify documents outside of Australia

- an authorised staff member of an Australian Embassy, High Commission or Consulate
- an authorised employee of the Australian Trade Commission who is in a country or place outside Australia
- an authorised employee of the Commonwealth of Australia who is in a country or place outside Australia
- a Member of the Australian Defence Force who is an officer or a non-commissioned officer with 5 or more years of continuous service
- a notary public, subject to approval by the Fund AML/CTF Officer on a case by case basis. Please contact the Fund for advice prior to obtaining a notary public certification.

Change of name or 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 suitable certified supporting document:

Purpose	Suitable supporting document
Change of name	Certified copy of marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Certified copy of guardianship papers or Power of Attorney

