

Application to make voluntary contributions

This form is used for existing Equisuper members to make voluntary contributions to their own Equisuper account. (complete sections 1-3). You can also make voluntary (after-tax) contributions by BPAY® by logging on to the member section of our website.

If you are making a contribution to your account and you are not already a member of Equisuper, you need to complete the *Membership Application* form attached to the Product Disclosure Statement (PDS) applicable to your membership.

If you wish to make a contribution on behalf of your spouse, please complete the *Making a contribution on behalf of my spouse* form, available from our website or Helpline.

For all contributions, we assume that unless this form is accompanied by a *Investment Choice Variation* form (available on our website), the voluntary contributions you have requested will be invested according to the most recent advice we received from you. If we do not receive this advice, contributions will be allocated to the default investment option, Balanced Growth. You can change your investment choice for your current investments or future contributions at any time via our website.

There are limits to the amount of contributions you can make before penalty tax may be applied. Please refer to PDS for information on contribution caps.

Step 1 – Complete your personal details

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

Title Mr <input type="radio"/> Mrs <input type="radio"/> Ms <input type="radio"/> Miss <input type="radio"/> Other <input type="text"/>	Date of birth <input type="text"/> / <input type="text"/> / <input type="text"/>
Given names <input type="text"/>	
Surname <input type="text"/>	
Postal address <input type="text"/>	
Suburb <input type="text"/>	State <input type="text"/> Postcode <input type="text"/>
Daytime Telephone <input type="text"/> - <input type="text"/>	Mobile <input type="text"/> - <input type="text"/>
E-mail <input type="text"/>	
Equisuper Membership number <input type="text"/>	

Step 2 – Voluntary Contribution

I wish to make a voluntary contribution to my Equisuper account. A cheque payable to Equisuper is attached.

I wish to contribute:

<input type="checkbox"/> Non- concessional (after tax) contribution*	\$ <input type="text"/>
<input type="checkbox"/> Self-employed contribution**	\$ <input type="text"/>
<input type="checkbox"/> SG Voucher	\$ <input type="text"/>
Total amount	\$ <input type="text"/>

* Note If you are rolling money into Equisuper from another fund, you must complete the *Rollover Authority* form available on our website www.equisuper.com or our **Helpline 1800 682 626**.

By making an after-tax contribution, you may be eligible for the Government co-contribution. Please refer to *Fact Sheet#12* for further information.

** You can make a contribution to your account and claim a tax deduction as a substantially self-employed individual under section 290-170 of the Income tax Assessment Act 1997. You may also be eligible to claim a tax deduction for your contribution if you are not employed. You should send us a *Notice of intent to claim a tax deduction for super contributions or vary a previous notice* form available from the ATO website or by calling our Helpline. Any contribution you claim a tax deduction on will count towards your concessional contribution limit. By making a post-tax contribution you may be eligible for the Government co-contribution.



Step 3 – Sign the form

I certify that I

- am under age 65 or I am aged 65-74 and have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year
- am aware there are certain limits on contributions after which penalty tax may apply
- acknowledge that generally my contribution will be applied to my Equipsuper account as the date Equipsuper receives my contribution and that this contribution will be preserved
- understand that this contribution will be invested according to my existing investment strategy
- understand that if I am eligible to claim any part of this contribution as a tax deduction, I must advise Equipsuper of the claim amount
- 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.

Signature

Date

/ /

Please return your completed form together with your cheque to Equipsuper, GPO Box 4303 Melbourne, VIC 3001.

