Make a personal contribution

Equip Super

About this form

This form is for existing Equip Super members to make a personal after-tax contribution to their own Equip Super account. You can also make personal contributions by BPAY®. There are limits to the amount of contributions you can make before penalty tax may be applied. For more information visit **ato.gov.au** or see our *How super works* guide at **equipsuper.com.au**

If you are not already a member of Equip Super, you will need to complete a member application form first - see our website for further information. If you wish to make a contribution on behalf of your spouse, complete the *Make a spouse contribution* form available on our website or contact us for a copy.

1 – Your member details

Please complete in pen using CAPITAL letters

Member number

Title
Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

Sex
Male ☐ Female ☐

Date of birth (ddmmyyyy)

First name

Last name

Postal address (must be provided)

Suburb

State

Postcode

Country (if not Australia)

Business hours phone

After hours phone

Mobile

Email

2 – Personal contribution

Please make your cheque payable to Equip Super and send it to Equip Super with this form. All personal contributions, whether received by BPAY or cheque, will be processed as a non-concessional (after-tax) contribution.

I wish to contribute a non-concessional contribution of: **$** ☐ , ☐☐☐ , ☐☐☐ . ☐☐

Important note

By making a non-concessional contribution, you may be eligible for the Government co-contribution. There are eligibility requirements and you can find out more on our website or by contacting us. Alternatively, if you intend to claim a tax deduction on your personal contribution, you will need to complete the Equip Super *Deductions for Personal Super Contributions* form and send it to Equip Super.
If you are between the age of 67 and 74, you will need to meet the work test to be eligible to claim your personal contribution as tax deduction. Further information is available at **ato.gov.au**

Need help?

1800 682 626 **equipsuper.com.au** Equip Super, GPO Box 4303, Melbourne VIC 3001

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as trustee for Equipsuper ABN 33 813 823 017 USI 33 813 823 017 000

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3 – Your investment mix for this personal contribution

Complete this section if you wish to choose the investment mix this personal contribution is to be invested in. If you do not make a choice or if you don't complete this section correctly, your personal contribution will be invested in accordance with your existing future contribution strategy, or your plan's default option if you have not nominated a future contribution strategy. Please note that any election you make below will apply only to this personal contribution.

I would like to invest this personal contribution as follows:

Diversified options		Sector Specific options	
Growth Plus	$, .	Australian Shares	$, .
Growth	$, .	Overseas Shares	$, .
Balanced Growth	$, .	Diversified Fixed Interest	$, .
MySuper*	$, .	Cash	$, .
Balanced	$, .		
Capital Stable	$, .		
Index Diversified	$, .		

Total Investment $, .

Your changes will take effect when your contribution and completed form is received and processed. See your Product Disclosure Statement for more details.

* The MySuper option is not applicable to defined benefit members. If you are a defined benefit member and you choose the MySuper option, we will apply your MySuper election to the Balanced Growth option.

Privacy

The personal information you provide on this form will be used in accordance with Togethr Trustee's Privacy Statement, which you can view online at **equipsuper.com.au/privacy** or you can obtain a copy by contacting us on **1800 682 626**.

Togethr Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

4 – Sign this form

By signing this form I:

- confirm that I am aware there are certain limits on contributions after which penalty tax may apply.
- understand that if I am eligible to claim any part of this contribution as a tax deduction, I must advise Equip Super of the claim amount using the relevant form.

Signature

X

Date (ddmmyyyy)

Please return your completed form to Equip Super, GPO Box 4303, Melbourne Vic 3001.

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