

Make a spouse contribution



About this form

You can use this form to contribute to your spouse's account in Equip. You will need to complete this form each time you wish to make a spouse contribution into Equip. There are limits to the amount of contributions that can be made before penalty tax may be applied.

1 – Spouse contribution eligibility

Please complete in pen using CAPITAL letters

For Equip to accept a contribution, you need to confirm your eligibility below. Please call us before making a contribution if you do not meet these conditions.

You must meet both of these conditions

- We are married or we live together on a genuine domestic basis; and
- We are both Australian residents for tax purposes

And the receiving spouse must be:

- under age 67; or
- aged between 67 and 74 and was gainfully employed for at least 40 hours in 30 consecutive days in the current financial year; or
- aged between 67 and 74 and was gainfully employed for at least 40 hours in 30 consecutive days in the previous financial year and at the end of that financial year they had a total balance of less than \$300,000 and has not previously claimed a work test exemption.

2 – Contributing spouse and contribution details

Title	Sex	Date of birth (ddmmyyy)
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>	<input type="text"/>
First name	Last name	
<input type="text"/>	<input type="text"/>	
Contribution amount \$ <input type="text"/> , <input type="text"/> . <input type="text"/> (If paying by cheque, please make it payable to Equisuper and attach to this form)		

4 – Receiving spouse account details

The receiving spouse needs to have an Equip account open before this spouse contribution can be accepted. We also require the receiving spouse's tax file number (TFN) which can also be provided as part of the new account application process online at equisuper.com.au.

Title	Sex	Date of birth (ddmmyyy)	Member number
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>	<input type="text"/>	<input type="text"/>
First name	Last name		
<input type="text"/>	<input type="text"/>		
Postal address (must be provided)			
<input type="text"/>			
Suburb			
<input type="text"/>			
State	Postcode	Country (if not Australia)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Business hours phone	After hours phone	Mobile	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Email			
<input type="text"/>			

Need help?

Call us on 1800 682 626 or www.equisuper.com.au Equip, GPO Box 4303, Melbourne VIC 3001

Issued by Togethr Trustees Pty Ltd ABN 64 006 964 049 AFSL 246383 as trustee for Equisuper Superannuation Fund ABN 33 813 823 017 USI 33 813 823 017 000

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Privacy

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

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1800 682 626. You can also manage your communication preferences via Equip's secure website or by following any instructions in the emails we may send you.

Equip's Privacy 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. Our administrator, Mercer Outsourcing (Australia) Pty Ltd, will also handle your personal information. You can view Mercer's Privacy Policy online at www.mercer.com.au/privacy.html.

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.

5 – Contributing spouse and receiving spouse to sign the form

By signing this form we:

- confirm that the contributing spouse wishes to make a contribution to the Equip account of the receiving spouse as named on this form
- confirm that the receiving spouse is an existing Equip member eligible to receive such contributions
- confirm that we provided correct answers to the spouse contribution eligibility in section 1 of this form.
- acknowledge that this contribution is for the benefit of the receiving spouse and cannot be repaid to the contributing spouse.

Contributing spouse signature

Date (ddmmyyyy)

Receiving spouse signature

Date (ddmmyyyy)

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

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