

Make a personal contribution



About this form

This form is for existing Equip members to make a personal after-tax contribution to their own Equip 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, 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 – Member declaration

Please complete in pen using CAPITAL letters

For Equip to be able to accept a personal contribution, you need to be eligible to make the contribution. Call us before you make a personal contribution if you are unable to meet one of these conditions.

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

2 – Your member details

| | | | |
|--|---|----------------------------|----------------------|
| Title | Sex | Date of birth (ddmmyyyy) | 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"/> | | | |

3 – Personal contribution

Please make your cheque payable to Equisuper and send it to Equip 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 an Australian Taxation Office (ATO) 'Notice of Intent to Claim or Vary a deduction for Personal Super Contributions' and send it to Equip. The ATO notice and further information is available at www.ato.gov.au.

Need help?

☎ Call us on 1800 682 626 or 🌐 www.equipsuper.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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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 | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Australian Shares | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Growth | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Overseas Shares | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Balanced Growth | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Property | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Equip MySuper* | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Fixed Interest | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Balanced | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Sustainable Responsible Investment | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Conservative | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> | Cash | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |
| Total investment (\$) | | | | \$ | <input type="text"/> , <input type="text"/> . <input type="text"/> |

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

* The Equip 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 Equip Balanced Growth option.

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.

4 – Sign the 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 of the claim amount using the relevant ATO form.

Signature

Date (ddmmyyyy)

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

Need help?

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