



Spouse contributions splitting from the Fund

You can use this form to split concessional contributions you have already made to the Fund with your spouse. An \$80 withdrawal fee applies to the split. If your spouse does not have a super fund account, they can join smartMonday DIRECT.

Important information

If you have any questions, please call us on **1300 880 588** or email enquiries@smartMonday.com.au

For more information go to our website smartMonday.com.au

- In order to prevent fraud and protect your benefit, all payment or transfer requests must be accompanied by a 'certified' copy of a photo ID (eg passport details page or driver's licence).
- A document may be certified by one of the qualified witnesses listed on pages 5-6 of this form.

Applicant details

To be completed by the Fund member whose contributions are being split.

Member number

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

Telephone

Mobile

Email

Residential address

Suburb

State

Postcode

Send your completed form to: smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).

smartMonday is the business name of the Aon Master Trust ABN 68 964 712 340 (the Fund) which has been registered by Aon Hewitt Limited ABN 48 002 288 646 AFSL 236667 as sponsor of the Fund. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

Contribution splitting details

If you intend to claim a tax deduction for personal superannuation contributions made during the relevant financial year, you must give the trustee notice of your intention to claim a deduction before you lodge a superannuation contribution splitting application.

Financial year ended (DD/MM/YYYY)

Taxed contributions to be split:

\$ (complete amount) OR % (complete percentage, to a maximum of the lesser of 85% of total concessional contributions and the concessional contribution cap for the financial year.)

Receiving spouse details

To be completed by the member who is receiving the contributions.

Personal details

The receiving spouse must be under preservation age, or at or over preservation age but under 65 and not retired. The receiving spouse cannot be age 65 or older.

Member number

Tax file number

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

Super fund details

Fund name

Unique Superannuation Identifier (USI)

Australia Business Number (ABN)



Privacy

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

Applicant declaration and authorisation

I request that you split the contributions detailed in *Contribution splitting details* to the superannuation account of my spouse as detailed in *Receiving spouse details*.

I declare that:

- I have read the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#), and consent to my personal (including sensitive) information being handled in accordance with these policies.
- if I am disclosing personal information about another person, I have obtained their consent to disclose their personal information to Aon or the trustee. I have made them aware that Aon or the trustee may disclose their information to third parties that are reasonably necessary to assist in the provision of the relevant services or products. If I have not obtained the consent of the other person, I will inform Aon or the trustee of this.

Signature

Date (DD/MM/YYYY)

Receiving spouse declaration and authorisation

I declare that at the date of this application:

- I am the spouse of the applicant in *Applicant details*/I am living on a genuine domestic basis with the applicant in *Applicant details* (delete as required), and
- I am under preservation age/I am at or over preservation age but under age 65 and I have not retired (delete as required).

Title

Given name

Surname

Signature

Date (DD/MM/YYYY)

Fund payment details

Supporting documents that the applicant needs to provide

Payment will be made by electronic funds transfer (EFT). To be completed by the receiving spouse's fund administrator.

Electronic funds transfer (EFT) payment

Name of fund's account

Name of financial institution

BSB number

Account number

Identification

We are required under the rules of the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 to verify a member's identity when making a payment or transfer. Your application must be accompanied by a 'certified' copy of a photo ID (eg passport details page or driver's licence).

Where a photo ID is not held, we will accept a certified copy of one document from list 'A' plus one document from list 'B' below.

List A

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits.

List B

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory within the past twelve months that contains your name and residential address. For example:
 - ↳ Tax Office Notice of Assessment
 - ↳ Rates notice from local council.

Change of name

If you have changed your name you must produce certified copies of 'link' documents. Link documents prove that a relationship exists between two or more names.

In the event that you have changed your name by marriage or divorce, the link documents you would be expected to provide would be a certified copy of a marriage certificate or a decree nisi (divorce certificate). In both cases, there must be evidence of your current name and previous name or names.

If you have changed your name legally you will need to provide the trustee with a certified copy of a change of name certificate or deed poll from the Registry of Births, Deaths and Marriages or similar body in your State.

Signing on behalf of a member

If you are signing on behalf of a member you must produce a certified copy of a current Guardianship order or Power of Attorney (POA) document. You must ensure that you provide all pages to the trustee, duly certified.

In the case of a POA you must also provide a signed declaration that the POA is current and has not been revoked.

Document certification

Copies of identification documents must be certified by one of the qualified witnesses in the list below.

The witness must sight both the original and the photocopy to ensure they are identical.

The witness then formally certifies each page of the photocopy with the following:

- > the words "I certify this to be a true copy of the original"
- > their signature
- > their printed name
- > their qualification as a witness (eg Justice of the Peace)
- > their registration number if applicable (eg JP# 123456)
- > the date.

Here is an example of formal certification:
I certify this to be a true copy of the original

John Smith

John Smith

Justice of the Peace
Registration # 123456

Dated/...../.....

Qualified witnesses for document certification

- > Chiropractor
- > Dentist
- > Legal practitioner
- > Medical practitioner
- > Nurse
- > Optometrist
- > Patent attorney
- > Pharmacist
- > Physiotherapist
- > Psychologist
- > Trade marks attorney
- > Veterinary surgeon
- > Agent of the Australian Postal Corporation who is in charge of an office 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 with 2 or more continuous years of service
- > Building society officer with 2 or more years of continuous service
- > Chief executive officer of a Commonwealth court
- > Clerk of a court
- > Commissioner for Affidavits
- > Commissioner for Declarations
- > Credit union officer with 2 or more years of continuous service
- > Employee of the Australian Trade Commission who is:
 - > in a country or place outside Australia, and
 - > authorised under paragraph 3 (d) of the *Consular Fees Act 1955*, and
 - > exercising his or her function in that place
- > Employee of the Commonwealth who is:
 - > in a country or place outside Australia, and
 - > authorised under paragraph 3 (c) of the *Consular Fees Act 1955*, and
 - > exercising his or her function in that place
- > Fellow of the National Tax Accountants' Association
- > Finance company officer with 2 or more years of continuous service
- > Holder of a statutory office not specified in another item in this Part
- > Judge of a court
- > Justice of the Peace
- > Magistrate

- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Master of a court
- 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 Australian Defence Force who is:
 - ↳ an officer, or
 - ↳ a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with 2 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:
 - ↳ the Parliament of the Commonwealth, or
 - ↳ the Parliament of a State, or
 - ↳ a Territory legislature, or
 - ↳ a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- Notary public
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - ↳ the Commonwealth or a Commonwealth authority, or
 - ↳ a State or Territory or a State or Territory authority, or
 - ↳ a local government authority; with 2 or more years of continuous service who is not specified in another item in this Part
- 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
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - ↳ the Commonwealth or a Commonwealth authority, or
 - ↳ a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- Person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- Officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees.