

Spouse contributions splitting into the Fund

This form can be used by superannuation fund members who want to split concessional contributions and transfer them to their spouse's account in the Fund. If you are splitting contributions from a superannuation fund other than this Fund, please contact that fund to confirm they will accept this form.

Important information

If you have any questions, please call us on **1800 816 575** or email support@smartMonday.com.au

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

- Applications should be sent to the fund that holds the superannuation contributions you intend to split. Your application should be lodged during the following financial year. For example, to split contributions made during the 2019/20 financial year, your application should be lodged in the 2020/21 financial year.
- Alternatively, you may split contributions made during the relevant financial year if your entire benefit is to be rolled over or transferred before the end of the financial year.
- For more general information on contribution splitting, phone the Australian Taxation Office on 13 10 20.

Applicant details

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

Member number

Fund name

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

Send the completed form to the applicant's fund

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 Fund 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.

Please select the appropriate option.

smartMonday PRIME Enterprise

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

Fund details

- Aon Master Trust Australian Business Number (ABN): 68 964 712 340
- Unique Superannuation Identifier (USI):
 - ▢ smartMonday PRIME Enterprise (formerly Enterprise Plan) 68964712340015



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)



**Information for applicant's
fund administrator**

Fund payment details

Payment will be made by electronic funds transfer (EFT). Please contact us for the payment details.
The applicant's fund administrator is to complete the following information:

Date processed (DD/MM/YYYY)

Amount

\$ *(complete amount)*

Narration entered for spouse split deposit (eg member name spouse split)

Please confirm by email or fax, including member name and narration used below when the deposit is made:

Email: support@smartMonday.com.au