GPO Box 89 MELBOURNE VIC 3001 VicSuper Member Centre **1300 366 216** vicsuper.com.au



# Make a personal deductible contribution directly to VicSuper (including self-employed contributions)

Indicates that providing the	his information is mandatory.	Not doing so may del	ay the processing of	f your request
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Important information regarding this contribution

- · Please complete this form to make a personal deductible contribution directly to your VicSuper account.
- You can also make personal deductible contributions via BPAY®. Login to VicSuper MembersOnline or contact the VicSuper Member Centre to obtain your unique reference number and the biller code. If you are not a registered user of VicSuper MembersOnline on 1300 366 216, you can register at vicsuper.com.au. If you wish to make your personal deductible contribution via BPAY, you do not need to complete this form.
- To make a personal deductible contribution, at the time you make the contribution you must be under age 65, or between age 65 and 74 (inclusive) and gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in a financial year in which the contribution is made. You cannot make a personal deductible contribution if you are age 75 or over.
- If eligible and you wish to claim a tax deduction on your contributions, please contact the Member Centre on 1300 366 216 to request a 'Notice of intent to claim or vary a deduction for personal contribution' form. This form must be completed and returned to VicSuper the earlier of the time you lodge your tax return or the end of the following financial year in which the contributions are made. Once we've received your form, VicSuper will send you an acknowledgment letter, which you'll need to claim your tax deduction in your tax return.
- VicSuper will deduct compulsory Government contributions tax (15%) effective the date we receive your valid 'Notice of intent to claim or vary a deduction for personal contributions' form.
- If you leave VicSuper Fund, roll over to a pension or make a partial withdrawal from your account, you must complete
  a 'Notice of intent to claim or vary a deduction for personal contributions' form prior to the withdrawal to ensure you
  are still able to claim a tax deduction.
- All contributions and earnings on these amounts made to complying superannuation funds such as VicSuper Fund, are preserved. This means you generally cannot access your contributions until you reach your preservation age (at least age 55, depending on your date of birth) and permanently retire from the workforce.
- Please be aware of the contribution caps outlined in Step 2 and ensure VicSuper has your tax file number (TFN).
   Without your TFN VicSuper cannot accept personal contributions into your VicSuper Fund account. To confirm if VicSuper has your TFN, please call the VicSuper Member Centre on 1300 366 216 or login to VicSuper MembersOnline.
- If you have any questions, please call our Member Centre on 1300 366 216.

Step 1: Personal details	Member number*													
	Title	Mr	Mrs	Ms	Miss	Oth	ner <i>(p</i>	olease	e spec	cify)				
	Surname*													
	Given name/s*													
	Residential address*													
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	Postal address													
	(if the same as your residential address, mark 'AS ABOVE')													
								F	Posto	ode				
	Phone number*													
	Mobile number*													
	Date of birth*					Ge	ende	r	Ma	ale	F	- ema	ale	

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Step 1: (continued) Personal details	Email																			
	By providing your email address you are agreeing to receive communications from VicSuper via email, or via VicSuper MembersOnline. You can change or further customise how you receive your communications from VicSuper at any time by logging into VicSuper MembersOnline or calling the Member Centre on 1300 366 216. If you are not registered for VicSuper MembersOnline you can register online. Some correspondence cannot be sent electronically so you may still receive some communications from VicSuper in the post.																			
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	Tax file number (TFN)																			
	Under the law, VicSuper is authorised to collect, use and disclose your TFN. We may disclose your TFN to another super fund, when your benefits are being transferred, unless you request in writing that your TFN not be disclosed to any other super fund.  Declining to quote your TFN to VicSuper is not an offence. However, giving your TFN to VicSuper will have the following advantages:  • we will be able to accept all permitted types of contributions to your account/s;  • other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions and benefit payments; and  • it will make it much easier to find different super accounts in your name so that you receive all your super benefits																			
	Would you like all your supe	when you retire.  Would you like all your super in one place?																		
	VicSuper can help! Simply tick We'll then let you know so you I consent to VicSuper usin locate superannuation an the future. If search result VicSuper requesting the A and disclosing my TFN fo this consent by contacting If VicSuper doesn't have your to	ng my nount s incl TO to r that g the	decidents held ude so transpurpty VicSu	de if y File N d on supera sfer those. I uper N	lum my anni nese l und	want ber (* beha' uation e amo derstanber (*	TFN) If by on amounts and the	to se othe ount into his one	earch r sup s he my onse 130	n Ausperand on VicSuent is	stral nua my upe give	ian atior y be er ac en i	Taxa n fur half cour n pe	ition nds ( by t nt w	Office or by the A	ce (A the TO I	ATO) ATO also sible	reco now cons	ds to and ent t usin	o in to
Step 2: Complete your payment details	Concessional contribution of contribution will count toward before-tax) contributions cap superannuation funds. From your concessional contribution financial year, provided your toon any excess at your margin excess for the contributions to your non-concessional (after-concessional contributions. B income exceeds \$250,000, good claim a tax deduction in your contribution cap. Please refember Guide for more information.	ds you of \$2 I July ns ca otal al tax ax alr tax) efore enera ar tax	our co 25,00 y 201 ap. The supe x rate ready control e-tax ally the the	onces 00 for 8 you ne firs r bala e plus r paid contr nese o urn, t	the cast year cast year cast year cast year cast and cast	nal control  e fination 'cae  e is le  inter  the finations  tribut  ce co  r Fut	ontrib ncial rry foou ca ess the est c fund. you are t ions ntrib ure S	oution year orwants an stang Harg The don axe are <b>utio</b>	ons ons or The ons	cap. is is is up to only are only are only our received for the control of the co	Cui the five mon D. If ece con or y te cou	rren e an ve ye unts f you ive trib you of 1! effe	ears ears s can u ex a ta outio r fur 5%; ectiv	theral cast of strices of strices of strices of the	e is a period of the control of the	a conter per unus ward e cante be conter fund er if your ur n	ncesersor sed p d is to p, you al to ount the your %. I	ssion n acro portion the 2 ou're o 15% ted to exce r ann <b>f you</b>	al (o oss a on of 019, taxe o of t owar ess ual u do essic	or all f /20 ed the rd not onal
	Cash Visit a VicSuper advice centre to obtain a Westpac deposit slip and unique reference number prior to taking your contribution to a Westpac branch. For further information please contact our Member Centre on 1300 366 216.																			
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	Contributions will be invested ac investment options. Visit <b>vicsup</b>	ccord <b>er.co</b>	ing to <b>m.au</b>	your for ir	futi nforr	ure co matio	ontrib n abo	utioi out V	n no ⁄icSu	mina per's	tior inv	ns (i vestr	f app	plica t op	able), tions	, or y s.	our/	curre	nt	

## **Step 3:**Read VicSuper's privacy information

The *Privacy Act* 1988 (Cwlth) governs the proper handling of personal information including how an organisation collects, uses, discloses and stores personal information.

You should have received information on how VicSuper handles personal information, either in your relevant VicSuper Product Disclosure Statement or in VicSuper's *Privacy brochure (personal information)*. If you have not received this information or would like another copy sent to you, please call our Member Centre on **1300 366 216**.

### Step 4: Sign this form

### You must complete the following declaration in addition to signing and dating this form in this step.

Please tick the appropriate box:

I declare that I am under age 65.

I declare that I am between age 65 and 74 (inclusive) and have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the financial year in which my contribution is made. I declare that the contribution will be received by the fund on or before the 28th day of the month following the month I turn 75.

#### I certify that:

- I understand that my contributions will be invested according to my future contribution nominations (if applicable), or my current investment options.
- I am aware of the contribution caps mentioned in Step 2.
- I have received and read VicSuper's privacy information. See Step 3.
- I acknowledge that VicSuper may require additional proof of identity in certain circumstances under the *Anti-Money Laundering and Counter-Terrorism Financing Act* 2006.

Signature\* Date\*

## **Step 5:**Send your form to VicSuper

Send your completed form, together with your cheque or money order made payable to VicSuper, to:

VicSuper, GPO Box 89 MELBOURNE VIC 3001

#### Before making your contribution please consider:

This form is not intended to be taken as advice or comprehensive tax guidance. It is general information and does not take into account your personal circumstances. You should seek your own independent taxation advice for matters such as determining your eligibility to claim a tax deduction for your contributions and liability for any contributions tax payable.