



Contributions splitting application form

MLC Superannuation

We respect your privacy and handle your information in accordance with our privacy policy. All forms and information about our privacy policy are available on mlc.com.au/privacy

There are specific legislative and business rules applicable to amounts that may be split. For these rules please refer to the MLC Contributions Splitting Application Instruction Guide when completing this form.

Part A – To be completed by member

1. Your personal details

Account number

Customer number (if known)

Contact telephone (business hours)

Title

Mr Mrs Miss Ms Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Gender

Male Female

Residential address

Postcode

2. Claiming a tax deduction for personal contributions

Do you want to claim a tax deduction for personal contributions made to your account in the current or previous financial year?

No Please go to **Section 3**

Yes Please complete and return a **Notice of intent to claim or vary a deduction for personal contributions** form available from mlc.com.au. You must claim before you request to contribution split.

3. Intent to split contributions made in the previous financial year

Do you wish to split with your eligible spouse, contributions you have made in the previous financial year?

No Please go to **Section 4**

Yes You can split up to 85% of your **taxed** contributions made in the previous financial year.

Please select the dollar (\$) or percentage (%) amount you wish to split.

Taxed Contributions \$ or %

Part A – To be completed by member continued

4. Intent to split contributions made in the current financial year

Do you wish to split with your eligible spouse, contributions you have made in the current financial year?

No Please go to **Section 5**

Yes You can elect to split up to 85% of your **taxed** contributions made during the current financial year if you are **fully rolling over** to another super fund or having your account **paid out in full**.

Please select the dollar (\$) or percentage (%) amount you wish to split.

Taxed Contributions \$ or %

5. Withdrawal instructions

If you want to draw the amount to be split from specific investment options, please specify the proportions (% or \$) in the table below. If you do not complete this table your contributions split will be made pro-rata across all investment options.

Name of investment option	Percentage (%)	Amount (\$)

Part B – Details of receiving spouse

6. Receiving spouse personal details

Title

Mr Mrs Miss Ms Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Gender

Male Female

Residential address

Postcode

7. Receiving spouse account details

Is the split to be made to a current superannuation account held by the receiving spouse with MLC?

Yes Please provide the receiving spouse's account number below and then go to **Section 8**

MLC account number

No Please complete below

If the contributions split is to be paid to a superannuation provider other than MLC, please provide the following details:

Provider name

Account name

Account number

Part B – Details of receiving spouse continued

7. Receiving spouse account details continued

Address

								Postcode		

Product name

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Australian Business Number (ABN)

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Unique Superannuation Identifier (USI) (if known)

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8. Applicant request and declaration

I request that the Trustee split an amount to my eligible spouse's superannuation account based on my instructions in Part A and Part B of this form. I understand that if either Part A or Part B is incomplete or unclear the Trustee will reject this form. I declare that the information I have provided is complete and correct. I understand that if I do not have available funds in my account this form will be rejected.

Signature of member

	Date (DD/MM/YY)					

9. Declaration of receiving spouse

I declare that at the date of this application I am eligible to receive a split of contributions from my spouse as I am:

less than preservation age; or

between preservation age and 65 years and have not retired from the workforce.

I request that the Trustee split an amount to my superannuation account in accordance with Part A and Part B of this form. I declare that the information I have provided on this form is complete and correct. I understand that if either Part A or Part B of this form are incomplete or do not meet the requirements set out in this form and the Instruction Guide the Trustee will not accept the application and the contributions split will not proceed.

Signature of spouse

	Date (DD/MM/YY)					

10. Send us your form

Please mail or fax you completed, signed and dated form to:

MLC MasterKey
PO Box 200
North Sydney NSW 2059
Fax: 02 9964 3334

If you have any questions please speak with your financial adviser, call us on 132 652 Monday to Friday between 8.00am and 6.00pm (AEST/EDT) or visit mlc.com.au