Contributions splitting

You can use this form to split concessional contributions you have already made to your smartMonday account and transfer a portion to your spouse's super account. Splitting contributions helps to balance how much super each of you have, which can have tax advantages. .

Important information

If you have any questions, please call us on **1300 614 644** or email **enquiry@smartmonday.com.au**

- There's a quite a lot to consider when splitting your concessional contributions with your spouse, and it can affect the tax you pay. We recommend seeking financial advice. The smartCoach service is available on **1300 262 241**. We have a *Contribution Splitting* factsheet at **smartmonday.com.au**. More information is available at the Australian Taxation Office website at **ato.gov.au**.
- You will need to provide the superannuation account details of your spouse. If they're already a member of smartMonday then simply provide their member number. If they're with another super fund then complete the details requested in this form.
- If you intend to claim a tax deduction for personal 'after tax' super contributions you've made during the financial year, you must provide the trustee with a Notice of intent to claim a tax deduction form before you apply to split your contributions. The form is available at **smartmonday.com.au** or contact us.

Applicant details

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

Member number

Given names

Surname

Date of birth (DD/MM/YYYY)

Phone (mobile)

Email

Postal address

Suburb

State

Postcode

Contribution splitting details

The date you complete below should be the previous financial year in which the contributions were made, unless you are closing your account during the current financial year.

Financial year ended (DD/MM/YYYY)

Write the amount ($ or %) of concessional contributions that you wish to transfer to your spouse's account. The amount cannot be more than 85% of the concessional contributions you have made to your smartMonday account during the year selected, or more than the concessional contributions cap that applies to you for the financial year selected.

Taxed contributions to be split:

$ *(amount)* **OR** %

Please note: the amount we transfer will be deducted proportionally according to your existing investment strategy. e.g. If you're invested 50% in the MySuper option and 50% in the Australian Shares - Diversified option then we will deducted the split amount equally from both options.

Receiving spouse details

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

Personal details

The receiving spouse must be under the applicable preservation age, or between their preservation age and 65 years, and have not retired.

Member number

Tax file number

Given names

Surname

Date of birth (DD/MM/YYYY)

Phone (mobile)

Email

Postal address

Suburb

State

Postcode

Super fund details

Fund name

Unique Superannuation Identifier (USI)

Australia Business Number (ABN)

Member Number

Privacy

The fund is subject to the trustee's privacy statement, which is available at stewarda.com.au/privacy-policy

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 and understood the important information on this form and the *Contributions splitting* factsheet.
- I understand that the contributions I have requested to be split will continue to apply to my concessional contributions cap for the financial year the contributions were made to my smartMonday account.
- I have read the the privacy statement and consent to my personal information being handled in accordance with that statement.
- if I am disclosing personal information about another person, I have obtained their consent to disclose their personal information to smartMonday or the trustee. I have made them aware that smartMonday 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 smartMonday 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 legally the spouse of the applicant
- I am under the preservation age that applies to me, or I am between my preservation age and 65 years, and have not retired.
- I have read and understood the important information on this form and the *Contributions splitting* factsheet.

Signature

Date (DD/MM/YYYY)

Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001.

Issued by Stewarda Pty Ltd ABN 56 098 527 256, AFSL 236049, RSE Licence L0000185 as trustee of the Smart Future Trust ABN 68 964 712 340, RSE Registration No R1000566 (the Fund). smartMonday is a registered trading name of smartMonday Solutions Pty Ltd (ABN 48 002 288 646). smartMonday is a product in the Fund.

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