Contribution Splitting Form

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FUND ABN 68 964 712 340 | USI 68964712340018

Complete this form if you are a Verve Super member and you wish to split your superannuation with your spouse.

This form and accompanying documents can be posted to **Verve Super, GPO Box 2753, Brisbane QLD 4001** or scanned and emailed to **hello@vervesuper.com.au**. If you have any questions or need assistance in completing this form, please contact us on **1300 799 482** or **hello@vervesuper.com.au**.

IMPORTANT —

(a) Not all types of contributions can be split with your spouse. Contributions that can be split include employer contributions, salary sacrifice contributions, personal contributions that you can claim a deduction for, and contributions made by family and friends.

(b) Split contributions are treated like rollovers, and do not count towards the non-concessional (after tax) contributions cap of the person receiving the split contribution. However, the contributor cannot split more than the legislated concessional (before tax) contributions cap. For more information on splitting contributions and contribution caps, please read the Verve Super **Product Disclosure Statement** and **How Verve Super Works Guide** before completing this form. You can obtain a copy from **www.vervesuper.com.au** or on request by phoning **1300 799 482**.

Section 1: Personal Details – Contributing Spouse

GIVEN NAME(S)

SURNAME

MEMBER NUMBER

DATE OF BIRTH (DD/MM/YYY)

MOBILE PHONE NUMBER

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

* By providing your email address, you consent and authorise us to send you communications, including information required by law, in electronic format (email or similar technologies) whenever possible. You can elect to receive communications by post at any time by contacting Verve Super on **1300 799 482** or by email at **hello@vervesuper.com.au**.

Contribution Splitting Form

Section 2: Personal Details – Receiving Spouse

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYY)^

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^ In accordance with superannuation legislation, you must be aged less than the preservation age that applies to you, or aged between your preservation age and 65 years and not retired, in order to receive a split contribution to your superannuation account. If you fail to meet this criterion on the date a contribution is received on your

MOBILE PHONE NUMBER

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

* By providing your spouse's email address, your spouse consents and authorises us to send communications, including information required by law, in electronic format (email or similar technologies) whenever possible. Your spouse can elect to receive communications by post at any time by contacting Verve Super on **1300 799 482** or by email at **hello@vervesuper.com.au**.

Contribution Splitting Form

Section 3: Contribution Splitting Details

Contributions you split must be from the previous financial year, unless you are planning to close your account with Verve Super, in which case you can also split the current financial year (provided the application is made before the withdrawal or rollover occurs).

IMPORTANT — You cannot split more than 85% of your eligible contributions* for the financial year you nominate. If you nominate an amount greater than the legislated concessional contribution cap, the amount transferred will be reduced accordingly.

* Eligible contributions include employer contributions (including salary sacrifice contributions) and personal contributions you have made for which you have claimed a tax deduction. You must have claimed the tax deduction before you lodge this form.

PREVIOUS FINANCIAL YEAR:

30 JUNE ☐☐☐☐ AMOUNT $ _____ **OR** PERCENTAGE _____ %

CURRENT FINANCIAL YEAR: If completing this row, please ensure that this form is submitted with a **Withdrawal Form** which is available from **www.vervesuper.com.au**.

30 JUNE ☐☐☐☐ AMOUNT $ _____ **OR** PERCENTAGE _____ %

Section 4: Superannuation Account Details – Receiving Spouse

My spouse is *(select one)*:

☐ A MEMBER OF VERVE SUPER MEMBER NUMBER _____

☐ A MEMBER OF ANOTHER FUND*

* A transfer to another fund cannot occur without the ABN and USI of the fund, and your spouse's Member Number for that fund.

NAME OF FUND _____

FUND USI _____

FUND ABN _____

MEMBER NUMBER _____

Verve SUPER

Contribution Splitting Form

Section 5: Declarations and Signature – Receiving Spouse

By completing this form, I declare that:

- I am the spouse of the applicant.
- I am married to my spouse, or live with my spouse on a genuine domestic basis.
- I (select one):

☐ **HAVE NOT REACHED MY PRESERVATION AGE.**

☐ **AM BETWEEN MY PRESERVATION AGE AND AGE 65, AND HAVE NOT PERMANENTLY RETIRED FROM THE WORKFORCE.**

- I understand that this contribution will remain preserved in my account until a condition of release occurs, such as retiring after reaching my preservation age or reaching age 65.
- I have read the Privacy Statement (below) and consent to Verve Super using my personal information for the purposes as stated.

SIGNATURE OF RECEIVING SPOUSE*

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* This form accepts an electronic signature or an original 'wet' signature.

PRINT NAME

DATE

☐☐ / ☐☐ / ☐☐☐☐

PRIVACY STATEMENT: By signing this form you consent to Verve Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed, and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. For more information about how your personal information is handled, please view our Privacy Policy at **www.vervesuper.com.au**, phone **1300 799 482** or email us at **hello@vervesuper.com.au**. The Trustee's privacy statement can be found at **stewarda.com.au/privacy-policy**

Contribution Splitting Form

Section 6: Declarations and Signature – Contributing Spouse

By completing this form, I declare that:

- All the details that I have provided are true and correct.
- I have made an informed decision because I have read and understood the information relating to contribution splitting contained in the **How Verve Super Works Guide**.
- I am married to my spouse, or live with my spouse on a genuine domestic basis.
- My spouse and I are Australian residents for tax purposes.
- I understand that I can only make one contribution splitting application per financial year.
- I understand that the value of my Verve Super account will decrease by the amount transferred out in accordance with this request.
- I understand that this contribution will remain preserved in the account of my spouse until a condition of release occurs, such as my spouse retiring after reaching preservation age or reaching age 65.
- I have read the Privacy Statement (below) and consent to Verve Super using my personal information for the purposes as stated.

SIGNATURE OF CONTRIBUTING SPOUSE*

.....

* This form accepts an electronic signature or an original 'wet' signature.

PRINT NAME

DATE

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PRIVACY STATEMENT: By signing this form you consent to Verve Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed, and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. For more information about how your personal information is handled, please view our Privacy Policy at **www.vervesuper.com.au**, phone **1300 799 482** or email us at **hello@vervesuper.com.au**. The Trustee's privacy statement can be found at **stewarda.com.au/privacy-policy**