

Member voluntary contribution

When to use this form



You can make voluntary contributions at any time so long as:

- you have provided your Tax File Number to Club Plus Super;
- you meet the age eligibility rules shown in section 3; and
- your Total Superannuation Balance was less than \$1.6 million at 30 June 2019

Please complete this form in black ink using BLOCK letters. This request will be invalid if not signed and dated.

Cheques must be made payable to **Club Plus Super**. Please return this completed form with the attached cheque to:
Club Plus Super Administration, Locked Bag 5007, Parramatta NSW 2124

Do you know we accept BPAY® and EFT for your personal contribution?

BPAY and EFT enable quick and secure contributions, at any time that is convenient, 24-hours a day. In most cases monies will be allocated to your Club Plus Super account the following business day.

BPAY payment option

By using appropriate BPAY biller codes and reference numbers, you can securely transfer funds from your savings and cheque accounts held with participating financial institutions, directly into your Club Plus Super account. BPAY biller codes and reference numbers for each contribution type can be found by logging in to your account via *MemberAccess* or mailed upon request by calling our Member Hotline on **1800 680 627**.

BPAY is ®Registered to BPAY Pty Ltd ABN 69 079 137 518

EFT payment option

You can securely transfer funds from your savings or cheque account directly into your Club Plus Super account via EFT.

Our EFT details can be found by logging in to your account via *MemberAccess* or mailed upon request by calling our Member Hotline on **1800 680 627**.

If you wish to make regular after-tax contributions to Club Plus Super you can complete a Direct Debit Authority form and we will deduct regular amounts from your nominated bank account.

Section 1: Personal details

Member number:

Title: Mr/Mrs/Ms/Miss/Other

Date of birth (DD/MM/YYYY):

Surname:

Given name(s):

Address:

Suburb

State

Postcode

Phone number:

Email:

Section 2: Providing your Tax File Number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect, use and disclose your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change.

The trustee of your super fund may disclose your TFN to another super provider, when your benefits are being transferred, unless you request the trustee of your super fund in writing that your TFN not be disclosed to any other super provider.

Declining to quote your TFN to the trustee of your super fund is not an offence. However giving your TFN to your super fund will have the following advantages:

- your super fund 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 to your super and benefit payments when you start drawing down your super benefits; and
- it will make it much easier to find different super accounts in your name so that you receive all your super benefits when you retire.

Tax File Number:

Member voluntary contribution (cont.)

Section 3: Eligibility to contribute (must be completed if 65 or over)

There are no age restrictions on making voluntary contributions under age 65. If you are over age 65, you must confirm which of the following applies to you:

I have reached age 65 but not age 75, and I have worked at least 40 hours in a period of at least 30 consecutive days in the current financial year and I meet the **Work Test** requirements.

I have reached age 65 but not age 75 and I am exempted from the **Work Test** as I met the **Work Test** in the previous financial year and had a total superannuation balance of less than \$300,000 at the end of the previous financial year and have not previously relied upon the work test exemption to make voluntary contributions to super.

Once you reach age 75, you cannot make voluntary contributions to super.

Please note: There are limits on the amounts you can contribute to super each year. For more information, please go to the ATO website at www.ato.gov.au.

Section 4: Contribution details

The enclosed cheque represents contributions from the following source(s).

Personal contributions*

\$

A contribution from my spouse

\$

* If you wish to claim a tax deduction on your personal contributions, you must complete and return the notice available at <https://www.ato.gov.au/forms/notice-of-intent-to-claim-or-vary-a-deduction-for-personal-super-contributions/>

Total

\$

Section 5: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at clubplussuper.com.au before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.

Section 6: Declaration and signature

I declare all the information provided on this form to be true as at the date of signing this form.

Member's signature

Date (DD/MM/YY)

Section 7: Types of contributions

Personal contributions:

These are contributions made from your after-tax salary or from your other savings.

Spouse contributions:

These are contributions made by a person, on behalf of their spouse into their spouse's account.

To understand more about the contributions you can make to super, limits and tax implications, go to the *Member Booklet* available at clubplussuper.com.au/pds.

Contact us

member hotline: 1800 680 627
email: member@clubplussuper.com.au
website: clubplussuper.com.au

Club Plus Superannuation Pty Ltd ABN 26 003 217 990, AFSL No. 245362
RSE Licence No. L0000529 as trustee of Club Plus Superannuation Scheme
ABN 95 275 115 088, RSE Registration No. R1000757

CP/VOL/CONT 739.2 09/19 ISS7