

Lump sum contribution payment

Form

Please complete this form if you want to make lump sum (after tax) contributions by cheque or EFT to your ESI Super account. You should send this completed, signed and dated form to ESI Super. **Please complete the form in BLOCK letters using blue or black pen.**

■ Your personal details

ESI Super member number (if known):

Surname: Title: Mr Mrs Ms Miss Dr

Given names: Date of birth: (DD/MM/YYYY) / /

Email address:

Daytime phone number:

■ Your contribution

We cannot accept any after tax contributions for you if we do not have your Tax File Number. Any after tax contributions you make will count towards your non concessional contributions limit. For more information, see the *ESI Super Member Guide* or contact us on 1300 363 240. If you are self employed and wish to claim a tax deduction please contact us.

Select payment method below..

- Payment via cheque.**
Please complete this section if you wish to make a lump sum payment by cheque. You should make cheques payable to ESI Super.

Amount of your payment: \$

- Payment via Electronic Funds Transfer (EFT).**
Please complete this section if you wish to make a lump sum payment via EFT. You should send this completed form to ESI Super by scanned email, mail, fax or deliver it in person on the date of payment to avoid delays in investing your contribution.

Please transfer your EFT payment to the account below:

Financial institution: **NAB**

Account name: **ESI Super**

BSB number: **084 004**

Account number: **835 191 343**

Amount of your payment: \$ Date of your payment: (DD/MM/YYYY) / /

Confirmation receipt number (Please use your name or member number as reference):

Please note: ESI Super does not accept cash payments over the counter.

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■ How to invest your contribution

If you would like to invest this contribution differently to your current investment choice, please indicate your preferred investment options below. Please note that this will only apply to this contribution. If you wish to change your investment choice you will need to complete a *Change of investment choice Form*.

Investment option	Percentage
Cash Deposit	
Cash Enhanced	
Stable	
Capital Managed	
Balanced	
SRI Balanced	
Growth	
Australian Shares	
International Shares	
	Total 100%

Please note: If you do not choose an investment option(s) or the total does not add up to 100%, your transfer will be invested in the investment option(s) previously chosen by you. If you have not made a previous investment choice it will be invested in the default option.

For information on investment choice and your default option, read the *ESI Super Member Guide*.

■ Declaration (tick one box below)

- I am 64 years of age or less.
- I am between 65 and 74 years of age and have been gainfully employed* for at least 40 hours in a period of not more than 30 consecutive days during the financial year.
- I have turned 75 this financial year, and have been gainfully employed* for at least 40 hours in a period of not more than 30 consecutive days during the financial year and this contribution is being paid less than 29 days after the end of the month in which I turned 75.

*Gainfully employed means employed or self employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment.

I am aware that this contribution will be credited to my superannuation account, and I will not be able to access the benefit until I permanently retire or satisfy another condition of release.

You must sign and date this form and return it to ESI Super with your contribution.

Member's signature:

Date: (DD/MM/YYYY)

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We need the information we have asked for on this form to properly identify you and process any lump sum contributions you wish to make. If you do not provide all of the information we may not be able to correctly credit your lump sum contributions to your account.

We will normally not disclose the information you provide on this form, except to your employer for the purpose of remitting your contributions. However, sometimes information about you might be disclosed to ESI Super's advisers (for example, legal advisers) and ESI Super might be required to disclose information about you to government departments (for example, the Australian Taxation Office or Centrelink).

You are able to access information ESI Super holds about you on request, and update any information which is inaccurate or out-of-date.

Please contact ESI Super if you would like a copy of our *Privacy policy*.

Please return this completed form by mail to: **ESI Super, GPO Box 959 Brisbane QLD 4001** OR **(07) 3229 7523** (Remember to send both sides of the form)
By facsimile to:
More information – Call **1300 363 240**. Email **super@esisuper.com.au** or visit **esisuper.com.au**

This document provides general financial product advice only and should not be relied on as legal or taxation advice, nor does it take the place of such advice. The financial product advice included in this document has been prepared without taking into account your individual objectives, financial situation or needs. Accordingly, before acting on the contents of this document, you should consider whether it is appropriate for your individual objectives, financial situation and needs. You should obtain an *ESI Super Member Guide* and consider that document before making any decision to acquire any ESI Super products.

Electricity Supply Industry Superannuation (Qld) Ltd (ABN 30 069 634 439 AFSL 336567) is the Trustee for the Electricity Supply Industry Superannuation Fund (Qld) (ABN 33 761 363 685).