

# Contribution splitting request

Form

If you want to split your super contributions with your spouse, then BOTH you and your spouse will need to complete this form. If you have not previously provided proof of your identity, you will also need to attach the necessary proof of ID documentation (as indicated on page 3 of this form). For assistance in completing this form please contact ESI Assist on **1300 363 240**.

Please complete the form in **BLOCK** letters using blue or black pen.

**THIS PART OF THE FORM IS TO BE COMPLETED BY YOU (THE CONTRIBUTOR)**

## Contributor's personal details

Please provide details of the person who is making this contribution.

ESI Super member number (if known):

Surname:  Title: Mr  Mrs  Ms  Miss  Dr

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

Address:

State:  Postcode:

Telephone (home):  Telephone (work):

Mobile:  Email:

I have attached the relevant proof of ID documentation as indicated on page 3 of this form.

## Contribution splitting details

Financial year ending 30 June

Concessional contributions to be split amount: \$  or percentage:  % (Up to 85%)

**Please note:** Any contributions subject to a Family law or other payment order/agreement may not be split. Post-tax contributions received from 6 April 2007, compulsory member contributions for Defined Benefit members, and rollovers or transfers of any kind cannot be split. You must lodge a new Contribution Splitting Request by 31 May to split contributions made in the last financial year. Your request will be processed using your current investment choice for future contributions at the date this form is processed by ESI Super.

## Contributor's declaration

I request that you split the contributions detailed in **Contribution splitting details** to the superannuation account my spouse as detailed in **Receiving spouse's contribution splitting**. I declare that the information provided on this form is correct.

Contributor's signature:  Date: (DD/MM/YYYY)  /  /

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**THIS PART OF THE FORM IS TO BE COMPLETED BY YOUR SPOUSE**

**■ Receiving spouse's details**

Surname:  Title: Mr  Mrs  Ms  Miss  Dr

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

Address:

State:  Postcode:

Telephone (home):  Telephone (work):

Mobile:  Email:

**■ Receiving spouse's contribution splitting details**

I would like to receive my contribution splitting transfer into (please tick the appropriate box):

**An ESI Super account – I am already a member**  
Member number:   
The amount received will be invested according to your current investment choice. If you wish to change your investment choice, you should complete and return a *Change of investment choice* Form to ESI Super.

**An ESI Super account – I am not yet a member**  
Please attach a completed *Member application* Form when returning this form to ESI Super.  
A *Member application* Form can be found in the back of our *Member Guide*, which can be downloaded from **esisuper.com.au** or contact us on 1300 363 240.

**Another super fund**  
Fund name:   
Superannuation fund information number (SPIN):   
Fund ABN:   
Fund address:   
Member number:

**■ Receiving spouse's declaration (to be signed by your spouse)**

I declare that at the date of this application I am the spouse of the applicant and I am:

- less than preservation age, or
- between preservation age and age 65 and not retired from the workforce.

For more information about preservation age please see the *ESI Super Member Guide*, which can be downloaded from our website – **esisuper.com.au**

Receiving spouse's signature:  Date: (DD/MM/YYYY)  /  /

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## ■ What documents can I use to prove my identity?

### EITHER

#### One of the following documents only:

- Current driver's licence issued under State or Territory law
- Passport (current or expired within the last two years)
- 18+ card.

### OR

#### One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate
- Centrelink pension card.

#### AND

#### One of the following documents:

- Centrelink payment letter (less than one year old) with your name and residential address
- Government or local council notice (less than three months old) with your name and residential address. For example:
  - Tax office notice of assessment
  - Rates notice from local council.

## ■ Who can certify my proof of identification documents?

- **A Justice of the Peace (JP) / Commissioner for Declarations**
- A police officer
- A notary public officer
- An officer of a financial institution (eg. **bank employee**) with two or more continuous years of service (with one or more financial institutions)
- A permanent **employee of Australia Post** with two or more years of continuous service
- A person enrolled on the roll of State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or National Institute of Accountants with five or more years of continuous membership.

The complete list of individuals approved to certify your proof of identity is more extensive than those listed above. To see a complete list, please go to our website – [esisuper.com.au](http://esisuper.com.au)

### Important

All copied pages of ORIGINAL proof of identification documents need to be certified as true copies by any individual approved to do so (see the list above).

To certify your ID they need to:

1. Compare the photocopy to the ORIGINAL
2. Stamp or write 'This is a true and correct copy of the original' followed by their signature, printed name, qualification (eg. Justice of the Peace, Police officer) and the date.

## ■ Has your name changed or are you signing on behalf of another person?

To prove the link between you and the other person, or your name change you'll need to provide a certified copy of a **Linking document** in addition to your other certified identification document/s (such as a driver's licence or passport). Some examples of linking documents can be seen below.

If you have changed your name you'll need a certified copy of one of these:

- Marriage certificate
- Deed poll, or
- Change of name certificate from the Births, Deaths and Marriages Registration Office.

If you are signing on behalf of another person you'll need a certified copy of one of these:

- Guardianship papers
- Power of Attorney.

## ■ Can I fax or email my proof of identification documents to ESI Super?

We need to see original signatures on your *Transfer your super* Form/s and certified proof of identification documents so you must post these documents to us, you cannot fax or email them. You can post these documents to the following address (no postage stamp is required):

**ESI Super**  
**Reply paid 959**  
**BRISBANE QLD 4001**

Please return this completed form by mail to:

**ESI Super, GPO Box 959 Brisbane QLD 4001**

More information – Call **1300 363 240**. Email [super@esisuper.com.au](mailto:super@esisuper.com.au) or visit [esisuper.com.au](http://esisuper.com.au)

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).