

SuperFuture RSA Contribution Form



How to lodge your form: You can use this form to accompany a one-off contribution or to advise BankVic of regular payments/direct credits from yourself (personal contributions) or your spouse (spouse contributions). All RSA contributions are processed by our Financial Planning team. You can drop into a branch, our Financial Planning department at Brandon Business Park, Building 4, 540 Springvale Road, GLEN WAVERLEY VIC 3150 or send to Financial Planning at Reply Paid 90210, MELBOURNE VIC 8060.

Please complete this form only if you already have a SuperFuture Retirement Savings Account (RSA) and wish to make a contribution to your account.

Before proceeding with this application, we recommend that you read BankVic's Privacy Policy available at bankvic.com.au/privacy which sets out key information about why we're collecting your personal information, and how we use, disclose and secure it.

Personal details

To ensure we have accurate and current information, we ask that you complete the 'contact details' and address if this may have changed.

RSA number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> Male <input type="checkbox"/> Female	Residential address	<input type="text"/> <input type="text"/>
Title	<input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Mr <input type="checkbox"/> Dr		Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<input type="checkbox"/> Other <input type="text"/>		Preferred telephone	<input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile
Surname	<input type="text"/>		Phone number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Given name/s	<input type="text"/>			

Deposit amount

Personal contribution Amount \$ Do you wish to claim a tax deduction in relation to a personal contribution? Yes No

If you ticked yes, you need to provide a valid 'Notice of intent to claim a deduction for a super contribution' (Notice) available from the Australian Tax Office www.ato.gov.au/forms or from us on request.

Declaration and Acknowledgement

I acknowledge that BankVic may only accept contributions in accordance with the Retirement Savings Accounts Regulations 1997 (Reg 5.03) and declare that;

- I am under 65 years of age, or
- I am 65 to 74 years of age, and
- have been gainfully employed for at least 40 hours in a consecutive period not exceeding 30 days in the financial year in which the contributions are being made; or
- having mandated employer contributions under an Award or industrial agreement being made on my behalf, or;
- I am aged 75 and having mandated employer contributions under an Award or industrial agreement being made on my behalf.

Note: If you are under 70 years of age and wish to make a spouse contribution, please have your spouse complete the following Spouse Contribution Declaration.

Signature

Date

<input type="text"/>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>
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Spouse contribution declaration

The spouse contribution declaration must be signed by an eligible spouse of the BankVic member who wishes to make a spouse contribution on the account holder's behalf.

The Australian Taxation Office (ATO) defines 'spouse' for the purpose of the rebate to mean your legal spouse (except where the person lives separately from you on a permanent basis), or de facto husband or wife (this includes same sex relationships).

Eligibility for tax offset or other tax relief will depend upon the individual circumstances and advice in this regard should be obtained from your financial advisor or accountant.

All spouse contributions will be treated as non-concessional contributions.

Declaration

I

(full name of contributing spouse) wish to make a contribution of; \$

To the SuperFuture RSA on the account holder's behalf

I declare that:

- I am the spouse of the account holder named on this application in terms of Section 290-230 of the Income Tax Assessment Act 1997 (the Tax Act) and I undertake to immediately notify BankVic if this situation changes. (see below definition of 'spouse').
- I am not entitled to a deduction under section 290-60 of the Tax Act in respect of my contribution (this is normally only available where you are your spouse's employer).

Eligible Spouse's Signature

Date

<input type="text"/>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>
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