

1. Member's personal details (to be completed by the person who is present member of the Fund)

Member number:

Title: Mr Mrs Miss Ms Other

Surname:

Given name/s:

Date of birth: Male Female

Home address:

Suburb: State Postcode

Email address:

Contact phone number: Mobile number

2. Receiving spouse details

Member number:

Title: Mr Mrs Miss Ms Other

Surname:

Given name/s:

Date of birth: Male Female

Home address:

Suburb: State Postcode

3. Transfer to another fund

If transferring to another fund please complete details below

Fund name

Superannuation Fund Number (for rollover fund only)

Fund address

Member Number (of rollover fund) ABN

4. Contribution splitting details

Financial year ending Taxed contributions to be split* Dollar amount \$ OR Percentage %

* You can not nominate to split more than 85% of the total taxed contributions made to your superannuation fund during the relevant financial year. If the nominated amount exceeds this, your application is invalid. Contact us if you need more information about the maximum amounts which can be split. We can also advise you of any rules they have for limits on amounts or percentages of contributions that can be split to your spouse's superannuation account. From 5 April 2007, untaxed contributions can no longer be split.

There are a range of taxed contributions which can be split. These contributions are made to Vision Super, and are taxable to the fund for income tax purposes. They include:

- Employer contributions
- Personal contributions for which an income tax deduction is to be claimed
- Superannuation Holding Accounts (SHA) special account amounts transferred to your superannuation account by the Tax Office on or after 1 January 2006
- Superannuation guarantee entitlements transferred to your superannuation account by the Tax Office on or after 1 January 2006, and
- Allocated surplus contribution amounts.



5. Applicant request and declaration

I request that you split the contributions detailed in section 4 to the superannuation account of my spouse as detailed in section 2. I declare that the information provided on this form is correct.

Full name (please print)

Signature Date

6. Proof of identity

Certified identification is required for superannuation contribution splitting requests. Please note that we may request further identification documentation if we are unable to confirm your date of birth and/or signature. This measure is a fraud prevention strategy, implemented by Vision Super to protect our members from undue risk. For instructions on how to certify a document, please refer to the enclosed Form 10.

7. Receiving spouse declaration

I declare that at the date of this application I am the spouse of the applicant and I am aged: less than my preservation age, OR between my preservation age and 65 years and have not retired from the workforce.

Full name (please print)

Signature Date

IMPORTANT IDENTIFICATION INFORMATION



To keep your superannuation safe, Vision Super needs to verify your identity when you want to access or move your money. Proving your identity helps us to make sure no one can fraudulently access your superannuation account.

The identification you provide us with needs to clearly show your full name, and either your date of birth or your home address. The easiest way to do this is with a certified copy of your driver's licence or passport, which shows all of this information. If you don't have a driver's licence or passport, you can still prove your identity, you will just need to show us more than one certified document from the lists in **STEP 1**, below. One will need to be a primary form of identification from the first list, like a birth certificate or Australian citizenship certificate, and one a document from the second list that shows your date of birth or the address where you live.

A certified copy means someone who is approved to certify documents has seen the original and certified the copy to say it is a true copy – there is a list of people who can certify your documents below. We cannot accept emailed or faxed copies of your certified documents, you need to send them in by post.

STEP 1: Photocopy your driver's licence or passport

- > Birth certificate or birth extract or
- > Australian citizenship certificate or
- > Centrelink pension card.

AND one of these documents that shows your name and your date of birth or home address issued in the last 12 months:

- > A letter from Centrelink about a government assistance payment
- > A notice issued by a government department (Commonwealth, state or territory or your local council), for example an ATO notice of assessment, your council rates notice, etc.
- > A gas, electricity or water bill.

Some people who can certify documents include:

A medical practitioner (eg your doctor)
A pharmacist
A legal practitioner (solicitor)
A full-time school teacher or teacher at a tertiary institute such as a university or TAFE
An Australia Post employee who has worked in a Post Office for more than two years
A bank, building society, credit union or finance company officer with over two years' service
Someone who has or is an authorised representative of a holder of an Australian financial services licence for over two years
A police officer
A nurse
A Justice of the Peace
A registrar or deputy registrar of a court
An elected local council representative
A senior officer of a council (ie a management role)
A CPA or member of the National Institute of Accountants

The full list of people who can certify documents is available on our website at: www.visionsuper.com.au/super/transfer-my-super/providing-proof-of-identity-information

STEP 2: Get your photocopies certified

You need to take your photocopies AND your original documents (e.g. your driver's licence/passport, or your other documents and letter) to someone who is approved to certify documents. They need to see the original as well as the copy so they can check the copy is accurate.

STEP 3: Make sure the person certifying your documents has:

1. Seen both your original documents and the photocopies
2. Written 'certified true copy' or stamped all pages of your photocopies
3. Included their:
 - a. Signature and the date they signed
 - b. Printed name
 - c. Qualification to certify documents (eg Nurse or Australia Post employee, etc)

STEP 4: Please send your certified copies to us by post:

Vision Super
PO Box 18041
Collins Street East
Melbourne Victoria 8003

Checklist

Here's a simple checklist to run through before you post your certified photocopies. Make sure you have:

- A copy of your driver's licence or passport OR
- Copies of two other documents, one showing your address (you do not need these two other documents if you have included the copy of your driver's licence or passport).

And check:

- Each page of your photocopies has been certified with the words 'certified true copy'
- The person certifying your documents has signed and dated the photocopies and included their name, qualification and address or place they work
- You have included the certified photocopies of your documents, with your letter or form to send to Vision Super. Please note that your copies must be the original ones that were certified and signed by the approved person. Photocopies of your certified copies cannot be accepted.