

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

Member number:

Title: ☐ Ms ☐ Mrs ☐ Miss ☐ Mr ☐ Mx Other

Surname:

Given name/s:

Date of birth:

Home address:

Suburb: State Postcode

Email address:

Contact phone number: Mobile number

2. Receiving spouse details

Member number:

Title: ☐ Ms ☐ Mrs ☐ Miss ☐ Mr ☐ Mx Other

Surname:

Given name/s:

Date of birth:

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.



Superannuation contributions splitting application

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

Please forward this completed form to: PO Box 18041, Collins Street East, Melbourne VIC 8003

Contact Centre: 1300 300 820 | memberservices@visionsuper.com.au | www.visionsuper.com.au

Vision Super Pty Ltd ABN 50 082 924 561 AFSL 225054, is the Trustee of the
Local Authorities Superannuation Fund ABN 24 496 637 884

By law we require proof of your identity should you wish to access your money.

The identification you provide us must clearly show your full name, your date of birth and your residential address. The easiest way to do this is with a certified copy of your current driver's licence, passport or proof of age card.

If you don't have a driver's licence, passport or proof of age card, 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.

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.

1 Photocopy of your current driver's licence or passport

An original certified copy of a primary photographic identification document:

- > Photocopy of your driver's licence **or**
- > Passport **or**
- > Proof of age card.

OR

List 1

An original certified copy of a primary non-photographic identification document:

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

AND

List 2

An original certified copy of a secondary non-photographic identification document

One of the following documents that shows your name and your current address issued in the last 12 months:

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

2

Get your photocopies certified

You need to take your photocopies AND your original documents, (eg 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.

Example:

Samantha Sample has provided a photocopy of her identification that included signature, full name, date of birth, and current residential address.

- > The certifying authority has sighted the original identification and confirmed that the copy is a true copy.
- > Details for the certifying authority are included: full name, qualification, registration number (if applicable), date and signature.



"I certify that this document is a true copy of the original"

Kate Citizen

Name: Kate Citizen

Qualification: JP

Date: 30 June 2020

Registration no: 111111

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 and
 - b. Printed name and
 - c. Qualification to certify documents (eg Nurse or Australia Post employee, etc).

4

Please send your certified copies to us by post

Vision Super
PO Box 18041
Collins Street East
Melbourne Victoria 8003

continued over...

People who can certify documents include:

- > An Australia Post employee engaged on an ongoing basis with 5 or more years of continuous service
- > A bank, building society, credit union or finance company officer with five or more years of continuous service
- > Someone who has or is an authorised representative of a holder of an Australian financial services licence for over five 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
- > 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

The *Statutory Declarations Regulation 2018* provides a list of who can certify your documents.

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, passport or proof of age card

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.

Have you changed your name or are you signing on behalf of another person?

If you've changed your name or are signing on behalf of the applicant, you'll need to provide a certified linking document proving a relationship exists between the two.

For a change of name, you can request linking documents (eg Marriage certificate, Deed poll, Change of name certificate, Decree Nisi (Divorce decree) or Registered relationship certificate) from the Births Deaths and Marriages Registration Office.

If you are signing on behalf of the applicant, you will need to provide Administration/Guardianship Papers and Power of Attorney documents.

Do proof of identity and/or linking documents need to be translated?

If your proof of identity and/or linking documents are in a language that is not understood by the person carrying out the verification, they must be accompanied by an English translation prepared by an accredited translator.

What if I don't certify my identity documents correctly?

If the identification documents you send with your application are not certified or incorrectly certified, you may need to resend certified proof of identity documents. This will lead to delays in processing your application.