

Make a spouse contribution



About this form

You can use this form to contribute to your spouse's account in Equip Super. You will need to complete this form each time you wish to make a spouse contribution into Equip Super. There are limits to the amount of contributions that can be made before penalty tax may be applied.

1 – Spouse contribution eligibility

Please complete in pen using CAPITAL letters

For Equip Super to accept a contribution, you need to confirm your eligibility below. Please call us before making a contribution if you do not meet these conditions.

You must meet the following conditions

- ☐ We are married or we live together on a genuine domestic basis
- ☐ We are both Australian residents for tax purposes
- ☐ The receiving spouse is under the age of 75

2 – Contributing spouse and contribution details

Title Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="text"/>	Sex Male <input type="checkbox"/> Female <input type="checkbox"/>	Date of birth (ddmmyyyy) <input type="text"/>
First name <input type="text"/>	Last name <input type="text"/>	
Contribution amount \$ <input type="text"/> , <input type="text"/> . <input type="text"/> (If paying by cheque, please make it payable to Equip Super and attach to this form)		

3 – Receiving spouse account details

The receiving spouse needs to have an Equip Super account open before this spouse contribution can be accepted. We also require the receiving spouse's tax file number (TFN) which can also be provided as part of the new account application process online at equipsuper.com.au.

Member number <input type="text"/>		
Title Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="text"/>	Sex Male <input type="checkbox"/> Female <input type="checkbox"/>	Date of birth (ddmmyyyy) <input type="text"/>
First name <input type="text"/>	Last name <input type="text"/>	
Postal address (must be provided) <input type="text"/>		
Suburb <input type="text"/>		
State <input type="text"/>	Postcode <input type="text"/>	Country (if not Australia) <input type="text"/>
Business hours phone <input type="text"/>	After hours phone <input type="text"/>	Mobile <input type="text"/>
Email <input type="text"/>		

Need help?

1800 682 626 equipsuper.com.au Equip Super, GPO Box 4303, Melbourne VIC 3001



Privacy

The personal information you provide on this form will be used in accordance with Togethr Trustee's Privacy Statement, which you can view online at equipsuper.com.au/privacy or you can obtain a copy by contacting us on **1800 682 626**.

Togethr Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

Our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer), will also handle your personal information. You can view Mercer's Privacy Policy online at mercer.com.au/privacy

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

4 – Contributing spouse and receiving spouse to sign the form

By signing this form we:

- confirm that the contributing spouse wishes to make a contribution to the Equip Super account of the receiving spouse as named on this form
- confirm that the receiving spouse is an existing Equip Super member eligible to receive such contributions
- confirm that we provided correct answers to the spouse contribution eligibility in section 1 of this form.
- acknowledge that this contribution is for the benefit of the receiving spouse and cannot be repaid to the contributing spouse.

Contributing spouse signature

Date (ddmmyyyy)

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Receiving spouse signature

Date (ddmmyyyy)

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Please return your completed form to Equip Super, GPO Box 4303, Melbourne VIC 3001

Need help?



1800 682 626



equipsuper.com.au



Equip Super, GPO Box 4303, Melbourne VIC 3001

