



Contribution Splitting form

Oracle Superannuation Plan

Use this form to apply to split your super contributions with your spouse. You and your spouse should both complete this form and return it to the Plan Administrator.

About contribution splitting

Contribution splitting applies to all employer and before-tax (“concessional”) super contributions made into the Oracle Superannuation Plan (the Plan) excluding rollovers and transfers from overseas funds.

You can split your contributions with your spouse only **once each financial year** and only after the end of that year. However, if you are leaving the Plan, you may apply to split contributions paid during the current financial year at the time you exit. You can only split your contributions with your spouse after you have first made an after-tax contribution to open a Spouse Account in the Plan.

My details (employee member to complete)

Last name	<input type="text"/>	Mr/Mrs/Ms/Miss	<input type="text"/>
First name	<input type="text"/>	Date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Work location	<input type="text"/>	Employee number	<input type="text"/>
Home address	<input type="text"/>		
	State	Postcode	
Male/Female (please tick)	<input type="checkbox"/> M	<input type="checkbox"/> F	

My spouse's details (spouse to complete)

Last name	<input type="text"/>	Mr/Mrs/Ms/Miss	<input type="text"/>
First name	<input type="text"/>	Date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Male/Female (please tick)	<input type="checkbox"/> M	<input type="checkbox"/> F	

Note: To be eligible for splitting, you must reside at the same address as your spouse.

My contribution splitting choices (employee member to complete)

I want to apply to split my available super contributions for the previous financial year with my spouse.

Please specify the amount of your contributions you wish to split with your spouse:

Before-tax contributions – I wish to split % or \$ (must be a whole dollar amount).
(You may split **up to 85%** of your employer and before-tax contributions*.)

* You must maintain a minimum account balance in the Plan of \$5,000.

My contribution splitting choices *continued...*

Where would you like these contributions paid?

My spouse is already a spouse member of the Plan and I would like these contributions paid into their Spouse Account.

I would like to open a Spouse Account in the Plan and have these contributions paid into this account.
To open an account for your spouse, you should both complete the *My Spouse form*, available from the Plan's website, <https://super.towerswatson.com/super/oracle>. You need to make an after-tax contribution to open a Spouse Account in the Plan.

I would like these contributions paid into my spouse's super fund, as shown below. (Your spouse may need to contact their fund to obtain this information.)

Full name of fund:	
Fund's Australian Business Number (ABN):	
Superannuation Product Identification Number (SPIN) (if available):	
Spouse's membership number:	
Cheque payee:	
Telephone: ()	Fax: ()
Address for correspondence:	
.....	

My declaration (employee member to complete)

I confirm that:

- I have read the Plan's Product Disclosure Statement (PDS) (available on the Plan's website) and understand the conditions relating to contribution splitting and the choices that are available to me.
- I am living with my spouse.
- I have not lodged another application to split contributions for the same financial year.

I also understand that:

- Any contributions I split with my spouse become the property of my spouse when they are paid out of the Plan.
- Splitting my contributions with my spouse will result in a corresponding reduction in my benefits in the Plan.
- The Plan's standard withdrawal fee (see the Plan's PDS) will be deducted from my account for each splitting application approved by the Trustee and processed on my behalf.
- I cannot claim a tax rebate on contributions split with my spouse.

I declare that the information I have provided on this form is true and correct to the best of my knowledge.

Signature (member)

Date

 / /

My declaration (spouse to complete)

I confirm that (please tick):

I have not yet reached my preservation age*.

OR

I am aged between my preservation age* and age 65, and have not permanently retired**.

* Your preservation age is between 55 and 60 years of age, depending on your date of birth. For more details, refer to the Plan's website, or speak to the Plan Administrator.

** If you have reached your preservation age, 'retired' means that you have ceased gainful employment and intend never again to be in gainful employment. If you are over age 60, 'retired' either means that you ceased gainful employment after age 60, or that you have ceased gainful employment (at any age) and intend never to be in gainful employment again.

I declare that the information I have provided on this form is true and correct to the best of my knowledge.

Signature (spouse)

Date

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Please return this original form to:

**The Plan Administrator
Oracle Superannuation Plan
PO Box 1442, Parramatta NSW 2124
Ph: 1800 127 953**