

Member contribution splitting application

Please complete and sign this form and return by:

✉ **Mail to:** BUSSQ GPO Box 2775, Brisbane QLD 4001

@ **Email to:** super@bussq.com.au

Need help? If you require help completing this form call **1800 692 877** or email super@bussq.com.au

1 Personal details

BUSSQ member number (if known)

Date of birth (dd/mm/yyyy)

Mr/Mrs/Ms/Miss

Given names

Surname

Contact number or mobile

Email

Street number

Street address

Suburb/Town

State

Postcode

Postal address (if different to above)

Suburb/Town

State

Postcode

2 Receiving spouse personal details

Date of birth (dd/mm/yyyy)

Mr/Mrs/Ms/Miss

Given names

Surname

Contact number or mobile

Email

Street number

Street address

Suburb/Town

State

Postcode

Postal address (if different to above)

Suburb/Town

State

Postcode

3 Proof of identity

To protect your superannuation account and satisfy our obligations, we need you to prove your identity before making withdrawals. You have two options for verifying your identity, please select one below.

Member proof of identity

Option 1

☐

Electronic verification

BUSSQ can easily verify your identity electronically. You just need to provide your driver licence or passport number details below.

By selecting this option, I confirm that I am authorised to provide the personal details presented and I consent to my information being checked via electronic means by BUSSQ and its administrator MUFG Pension & Market Services Holdings Limited (MUFG). I understand that my information will be subject to an information match request with the document issuer or official record holder and a corresponding result will be provided via a third-party system for the purpose of confirming my identity.

I also authorise disclosure of my name, residential address and date of birth to the credit reporting agency, Illion, to verify my identity. This is not a credit check and will not give BUSSQ access to any other information about you and will not impact your credit rating or be stored against your credit information file.

If the details you provide cannot be matched we will advise you in writing, and you will need to supply us with certified documents – see Option 2.

For further information on how your information is managed for electronic verification purposes, contact BUSSQ by calling **1800 692 877**.

Australian driver licence

Full name as it appears on your driver licence

Driver licence number

Card Number

Note: For help to locate your Card Number refer to the 'Certified documentation' section on the last page of this form.

State of issue

Expiry date

/ / 2 0

Australian passport

Passport number

Country of birth

Full name as it appears on your passport

Option 2

☐

Provide certified documents (see the 'Certified documentation' section of this form for more information).



Please mail documents if providing certified proof to BUSSQ's address, which is provided on this form.

Spouse proof of identity

Option 1

☐

Electronic verification

BUSSQ can easily verify your identity electronically. You just need to provide your driver licence or passport number details below.

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If the details you provide cannot be matched we will advise you in writing, and you will need to supply us with certified documents – see Option 2.

For further information on how your information is managed for electronic verification purposes, contact BUSSQ by calling **1800 692 877**.

Australian driver licence

Full name as it appears on your driver licence

Driver licence number

Card Number

Note: For help to locate your Card Number refer to the 'Certified documentation' section on the last page of this form.

State of issue

Expiry date

/ /

Australian passport

Passport number

Country of birth

Full name as it appears on your passport

Option 2

☐ **Provide certified documents** (see the 'Certified documentation' section of this form for more information).



Please mail documents if providing certified proof to BUSSQ's address, which is provided on this form.

4 Is your spouse eligible to receive split contributions?

Your spouse can only receive these split contributions if they meet one of the below eligibility criteria. Select the one that applies to you.

☐ My spouse is less than age 60 (preservation age)

☐ My spouse is between age 60 (preservation age) and 65 and has not retired from the workforce

5 Receiving spouse fund details

Your spouse must have a superannuation account in place before you lodge this contribution splitting application.

Is your spouse a BUSSQ member?

☐ YES If yes, please provide membership number

☐ NO If no, and your spouse would like to become a member they can join online at bussq.com.au.

Receiving spouse's fund other than BUSSQ

Name of fund

Account/Membership number

The fund's Australian Business Number (ABN)

The fund's Superannuation Fund Number (SFN)

Superannuation Product Identification Number (SPIN)

Street address

Suburb/Town

State

Postcode

6 Contribution splitting details

Up to 85% of concessional (taxed) contributions received for the year can be split eg. only employer and salary sacrifice contributions.

Financial year ended (YYYY)

Amount to be split and transferred

 \$

Your remaining account balance after the split (including fees) must be a minimum of \$8,000.

7 Claiming a tax deduction

If you have made personal contributions to superannuation you may be entitled to claim a tax deduction on these contributions up to the concessional contributions cap. If you wish to claim a tax deduction, you need to do this before you make any withdrawals from your super account.



You will also need to lodge a *Notice of Intent to claim a tax deduction* form available on our website at bussq.com.au

8 Privacy and other important information

BUSSQ collects, uses and discloses your personal information in accordance with the BUSSQ Privacy Policy and Privacy Collection Statement which is available from our website or by calling **1800 692 877**. This includes further information on how your information is stored for identity verification purposes and how to make a privacy complaint, including in relation to electronic verification. You do not have to provide your personal information, but we may not be able to administer your account or verify your identity if you don't. The Privacy Policy confirms to who and when we may disclose your personal information including if required by law or court/tribunal order, or with your permission. Please call us if you have any questions about your rights under the privacy legislation.

9 Authorisation and declaration

Member

- I request that you split the contributions shown in Section 6 Contributions splitting details to my spouse's superannuation account as shown in Section 5 Receiving spouse fund details.
- I understand that the contribution splitting fee outlined in the BUSSQ Super Handbook will be deducted from my BUSSQ account.
- I understand that all split contributions to my spouse's account will be preserved.
- I declare that the information provided on this form is correct.



Please sign and date.

Forms without both a signature and date are unable to be processed. **Note:** Digital signatures will not be accepted.

Member's signature



Dated (dd/mm/yyyy)

		/			/	2	0		
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Once completed and signed please return this form by:

Mail: BUSSQ GPO Box 2775, Brisbane QLD 4001 or **email:** super@bussq.com.au

Please note: If providing certified proof of ID, these documents must be mailed to BUSSQ at the address above.

Spouse

- We live together in a relationship on a permanent basis that meets the spouse definition as outlined in the BUSSQ Super Handbook.
- I declare that I am aged
 - less than age 60 (preservation age), OR
 - between my age 60 (preservation age) and 65 and have not retired from the workforce.
- I declare that all the details in this application form are true and correct



Please sign and date.

Forms without both a signature and date are unable to be processed. **Note:** Digital signatures will not be accepted.

Spouse's signature



Dated (dd/mm/yyyy)

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Once completed and signed please return this form by:

Mail: BUSSQ GPO Box 2775, Brisbane QLD 4001 or **email:** super@bussq.com.au

Please note: If providing certified proof of ID, these documents must be mailed to BUSSQ at the address above.

Certified documentation

BUSSQ can verify your identity quickly and securely using greenID, an electronic identity verification platform. If you are unable to, or do not consent to be verified electronically, you will need to provide certified documents to prove your identity. Please follow the below guide and mail your certified documents with your completed form to **BUSSQ GPO Box 2775, Brisbane QLD 4001**.

Please note certified proof of identity is only valid for a maximum of 12 months from the date the identification was certified.

Certified copies of the following documents can be used to prove your identity:

One of the following documents only:

- A current driver licence or permit issued under the law of a State or Territory.
- An Australian passport which can be up to two years out of date, that contains a photograph of the person in whose name the document is issued.
- Proof of Age Card
 - A card issued under a law of a State or Territory for the purpose of providing the person's age which contains a photograph of a person in whose name the document is issued (includes Proof of Age Card or National Identity Card); or
- National Identity Card
 - A card issued for the purpose of identification that contains a photograph and the signature of the person in whose name the document is issued; and
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is in a language that is not understood by the person carrying out the verification it must be accompanied by an English translation prepared by an accredited translator.

One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles you to financial benefits.

AND

One of the following documents:

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address.

For example:

- Tax Office Notice of Assessment
- Rates notice from local council.

OR

Have you changed your name?

If you have changed your name, in addition to the above listed certified documentation, you need to complete the Change of Details form (available on our website) and provide a certified copy of one of the following documents:

- Marriage Certificate (required even if the parties are separated)
- Decree Nisi, Certificate of Divorce or Decree Absolute
- Deed Poll documentation.

Are you acting on behalf of someone else?

If you are signing on behalf of another person you will need to send by mail original certified copies of the following documents (we cannot accept these via email):

- Current Power of Attorney document (with each page of the document certified)
- The member's identity documents as listed above
- Your identity documents.

Certifying your documents

All copies of proof of identity documents should be certified as a true copy of the ORIGINAL by an authorised person. Some examples of authorised persons are:

- A Justice of the Peace or Commissioner for Declarations
- A Police Officer
- A finance company officer or representative of an AFSL licence holder with five or more years continuous services with one or more licensees
- A lawyer, judge or magistrate
- Permanent employee of Australia Post with five or more years of continued service.

The certifier must sight the original and make sure both documents are identical, and then make sure all photocopied pages are certified as true copies by writing or stamping wording to that effect followed by their:

- Signature
- Name
- Qualification
- Date, and
- Phone number.



I certify this is a true copy of the original document.

Julie Preston
Justice of the Peace
19/06/2022
0412 345 678

Where to find the Card Number on your driver licence?

You can find your Card Number on the front and/or back of your driver licence. It is different from the licence number, as it's a unique identifier, which changes each time your driver licence is re-issued.

Note: The location for the Card Number does slightly vary amongst different state issued driver licences. The example images show where the Card Number is situated for the Queensland Driver Licence being both on the front and back.

If you need help to locate the Card Number on your driver licence, call us on **1800 692 877**.



Card Number



Card Number