

### Instructions

Please use this contribution advice if you are making contributions by cheque to your Superannuation account.

You should not complete this form unless you have read and understood the current Secure Super Account Product Disclosure Statement (PDS).

- Black or blue pen please
- Please place a X in boxes where required.
- Please use BLOCK letters.

Please send us your completed form by ONE of the following methods:

**Email:** superannuation@heritage.com.au

**Post:** Secure Super Account, PO Box 190

**Fax:** 07 4694 9782

Toowoomba Qld 4350

Please note: if you fax or email the form, there is no need to send us the original.

### Step 1 - Customer details

Account Number

Title

First Name

Last Name

Email

Date of Birth

Phone number (mobile)

### Step 2 - Customer contributions via cheque

To make contributions via cheque, please make cheque payable to:

The Heritage Bank Secure Super Account <<Customer name>> <<account number>> eg John Smith 12345678

**Contribution Type**

Personal Contributions:

\$

### Step 3 - Eligibility to contribute - personal contributions

To be able to make voluntary personal contributions, you must meet one of the eligibility criteria under superannuation laws. Contribution limits apply for taxation purposes. If the limits are exceeded, extra tax will apply.

To confirm that you are eligible to contribute, please select **ONE** of the below options that describes your current circumstances:

I am under the age of 65

I have reached age 65 but am not yet 75, and I have worked at least 40 hours in a period of not more than 30 consecutive days in the current financial year.

Please contact Heritage Bank immediately if your circumstances change. We may cease any direct debit, where the law requires or permits.

**Note:** If you are aged 65 or over, and wish to continue making personal contributions into your account each financial year, you will be required to complete a new Superannuation Contribution Eligibility Declaration form before the first contribution is made each year.

### Step 4 - Authority

- I declare I have read and understood the current PDS.
- I declare that the information I have completed is true and correct.

Signature of Contributor

Date