

# SECURE SUPER ACCOUNT

## MEMBER CONTRIBUTIONS BY CHEQUE

# Heritage Bank

### Instructions

Please use this form 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) which is available at [www.heritage.com.au/securesuper](http://www.heritage.com.au/securesuper)

- Please use black or dark blue pen as we scan the form for record keeping purposes.
- Please use BLOCK letters.
- Please place a X in boxes where required.

Please send us your completed form by Post: Secure Super Account, PO Box 190 Toowoomba Qld 4350

### Step 1 - Member details

Account number: \_\_\_\_\_ Account name: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Email: \_\_\_\_\_

### Step 2 - Member contributions via cheque

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

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

#### Contribution Type

The amount of the personal contribution is: \$ \_\_\_\_\_

### Step 3 - Eligibility to contribute

To make voluntary personal contributions, you must meet one of the eligibility criteria under superannuation laws. Contribution limits apply for taxation purposes and if the limits are exceeded, extra tax will apply. You should consider obtaining financial and taxation advice before making any investment decision.

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

☐ I declare that I am under 75.

OR

☐ I declare that I have turned 75 this financial year and this contribution is being paid less than 28 days after the end of the month in which I have turned 75.

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

### Step 4 - Authority and Declaration

- I declare I have read and understood the current Secure Super Account Product Disclosure Statement and that the information in this form is true and correct.
- I request Heritage Bank to credit this personal contribution to my account as a personal contribution.
- I have considered obtaining financial and taxation advice before making any investment decision and this personal contribution.

Signature of Contributor: \_\_\_\_\_ Date \_\_\_\_\_