

SPOUSE CONTRIBUTION FORM

Instructions

Use this form to make a contribution to your spouse's super account. Your spouse must be a member of Heritage Bank and meet the eligibility criteria outlined in the Spouse Contributions Fact Sheet available from www.heritage.com.au/banking/investment/superannuation/secure-super-account in order to be able to receive a contribution from you. If your spouse is not currently a member of Heritage Bank, they should read the Spouse Member PDS and complete the application form available from www.heritage.com.au before you complete this form.

Important:

A separate Spouse Contribution Advice form must be sent to Heritage Bank each time a spouse contribution is made.

If you wish to split your concessional super contributions into your spouse's super account, don't use this form. Instead, please call 13 14 22.

Please write in **CAPITAL LETTERS** and use a blue or black pen.

- Once you've completed and signed the form, please mail to Heritage Bank, 400 Ruthven St, Toowoomba, Qld 4350 or email a scanned copy to superannuation@heritage.com.au.
- If you have any questions, please contact our Member Services Team on 13 14 22.

Step 1 – Your Personal Details

Title _____ First name _____ Last name _____

Date of birth _____ Phone number (mobile) _____

Residential Address _____

Suburb/town _____ State _____ Postcode _____

Phone number (home) _____ Mobile _____

Email _____

Account Number _____ Tax File Number* _____

* Under Superannuation law, you are not obliged to disclose your tax file number, but there may be tax consequences if you choose not to do so.

Step 2 – Your Spouse's Details

Title _____ First name _____ Last name _____

Date of birth _____ Phone number (mobile) _____

Residential Address _____

Suburb/town _____ State _____ Postcode _____

Postal Address (if different from Residential Address) _____

_____ Suburb/town _____ State _____ Postcode _____

Phone number (home) _____ Mobile _____

Email _____

Account Number _____ Tax File Number* _____

* Heritage Bank cannot accept contributions in respect of your spouse if they have not provided us with their tax file number.

Step 3 – Contribution Amount

Amount of contribution \$ _____

Payment by Cheque

If you are paying by cheque, please attach your cheque to this form. Cheques should be made payable to Heritage Bank A/C and include your spouse's full name.

Payment by EFT

Your EFT payment should be transferred to the Heritage Bank account shown below. Please insert your spouse's Heritage Bank Member Number as a reference.

Secure Super Account

BSB: 638-110

Account Number _____

Step 4 – Declaration and Signature of Contributing Member

I understand that by signing this form I am acknowledging that:

- My contribution is non-refundable and that my spouse and I are responsible for understanding the eligibility criteria and caps relevant to spouse contributions.
- The information that I have provided is true and correct.
- I have read the Heritage Bank Privacy Statement below and I understand how Heritage Bank will use my personal information, and that of my spouse.

Signature of applicant _____ Date _____

Step 5 – Declaration and Signature of Spouse

I understand that by signing this form I am acknowledging that:

- I am the spouse of the applicant and I am aged under 75.
- My spouse and I are responsible for understanding the eligibility criteria and caps relevant to spouse contributions.
- Spouse contributions are subject to preservation rules and cannot be accessed until I reach my preservation age and permanently retire from the workforce, or satisfy another condition of release.
- The information that I have provided / has been provided on my behalf is true and correct.
- I have read the Heritage Bank Privacy Statement below and I understand how Heritage Bank will use my personal information.

Signature of applicant _____ Date _____

PRIVACY STATEMENT: By signing this form you consent to Heritage Bank collecting and using your personal information to manage your superannuation and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation. Your personal information may be disclosed to other parties, to the extent specifically permitted by the law. To access your personal information or for a copy of our Privacy Policy, visit www.heritage.com.au or phone 13 14 22.