

You can use this form to:

- Split your contributions with your spouse. Your spouse doesn't have to be a current GESB member to receive your contribution
- Open a new GESB Super account for your spouse if you would like to keep the split contributions with us
- Select how much of your contributions you would like to split with your spouse. You can split contributions made in the previous financial year, or in the current financial year if you are withdrawing your entire benefit

When filling out this form, if you are making the contribution, then you are the contributing spouse. If the contribution is made on your behalf, you are the receiving spouse.

Section 1 Your details

GESB member number

WIN No. Office Use Only

Mr Mrs Miss Ms Other

Surname (family name)

Given name(s)

Date of birth / / Male Female

Age next birthday

Residential address

 Postcode

Postal address (if different from residential)

 Postcode

Email address

Telephone – home

 ()

Telephone – work

 ()

Telephone – mobile

Section 2 Where contributions are to be split

Complete the section relevant to one of the following three options:

Option 1. Split the contribution to your spouse's existing West State Super or GESB Super account

Receiving spouse's details

Spouse's GESB member number (if applicable)

WIN No. Office Use Only

Name of spouse's fund

Mr Mrs Miss Ms Other

Surname (family name)

Given name(s)

Date of birth / / Male Female

Email address

Telephone – home

 ()

Telephone – work

 ()

Telephone – mobile

Your contribution will be allocated to your spouse's GESB Super or West State Super account and invested in your spouse's nominated investment plan. If your spouse has not nominated an investment plan, the contribution will be invested in the My GESB Super plan for GESB Super or My West State Super plan for West State Super (the default investment plans for these schemes). Your spouse can change or nominate an investment plan by using Member Online or by completing an 'Investment choice' form available at gesb.wa.gov.au/forms.

(continued over page)

FOR OFFICE USE ONLY



Option 2. Open a GESB Super account for your spouse

Receiving spouse's details

Mr Mrs Miss Ms Other

Surname (family name)

Given name(s)

Date of birth / / Male Female

Age next birthday

Residential address

Postcode

Postal address (if different from residential)

Postcode

Email address

Telephone – home Telephone – work
() ()

Telephone – mobile

Your contribution will be allocated to your spouse's new GESB Super account and automatically invested in the My GESB Super plan – the default investment plan for the GESB Super scheme.

Your spouse can change their investment plan in Member Online at gesb.wa.gov.au or by completing an 'Investment choice' form available at gesb.wa.gov.au/forms.

Spouse's tax file number (TFN)

Important note:

We are authorised to collect your TFN under the *Superannuation Industry (Supervision) Act 1993*, which will only be used for lawful purposes. These purposes may change in the future.

We may disclose your TFN to other super funds, when your benefits are being transferred, unless you request in writing that we don't.

It is not an offence for you not to provide us with your TFN. However, giving your TFN to us will have the following advantages (which may not otherwise apply):

- We will be able to accept all types of contributions to your account(s)
- The tax on contributions to your superannuation account(s) will not increase
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- It will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire

The purpose for which your TFN can be used, and the consequences of not quoting it, may change in the future as a result of changes in the law.

I do not wish for my tax file number to be passed onto another super fund

For more information on providing your TFN, you can call the ATO super helpline on 13 10 20.

I declare that the information provided about my TFN is true and correct.

Receiving spouse

Your signature Date / /

Option 3. Split the contribution to your spouse's existing super account in another complying super fund

If this contribution is going to a Self Managed Super Fund (SMSF), see the note on the next page.

Mr Mrs Miss Ms Other

Surname (family name)

Given name(s)

Date of birth / / Male Female

Age next birthday

Residential address

Postcode

Postal address (if different from residential)

Postcode

Email address

Telephone – home Telephone – work
() ()

Telephone – mobile

Name of spouse's fund

Address of fund

Postcode

Telephone number of fund

Fund's Australian Business Number (ABN)

Fund's Unique Superannuation Identifier Number (USI)

OR

Fund's Registrable Superannuation Entity Number (RSE)

□ □ □ □ □ □ □ □

Spouse's member number (in fund)

□ □ □ □ □ □ □ □ □ □

Note: if you are contributing to a SMSF, you will need to provide a certified copy of the letter from the Australian Business Register regarding SMSF registration. This letter should also show the address of the SMSF. For information on how to certify documents, see Section 6.

Section 3 Request and declaration

Contributing spouse

- 1. I request that you split the contributions detailed in Section 4 to the super account of my spouse as detailed in Section 2.
2. If I have chosen to split current financial year contributions, I have completed a 'Benefit access' form to access my benefit and I am closing my account.
3. I understand that once I give this application to you, I cannot make another application for the same financial year.
4. I understand that the amount that may be split must not exceed my concessional contributions cap for the relevant financial year and, if necessary, have checked the maximum amount that can be split with the ATO

Your signature Date
x / /

Receiving spouse

In signing this form I acknowledge that:

- 1. If I am an existing GESB member, I understand that the contribution will be allocated to my nominated West State Super or GESB Super account and invested in my nominated investment plan.
2. If I am a new GESB member, I have read the 'GESB Super Product Information Booklet' and understand it serves as general information only and does not contain personal financial advice.
3. I understand that any benefits accruing on my behalf in West State Super or GESB Super are subject to rules and conditions of release applicable to that scheme, including preservation rules.
4. I declare that at the date of this application I am the spouse or partner of the applicant and I am aged: less than my Commonwealth preservation age OR between my Commonwealth preservation age and 65 years and have not retired.

Signature Date
x / /

Both spouses

In signing this form we confirm that:

At the time of making this application we live together on a bona fide domestic basis as a married couple or as de facto partners.

Contributing spouse

Your signature Date
x / /

Receiving spouse

Signature Date
x / /

Section 4 How much of my contribution to split

My contributions are to be split from the following account:

- GESB Super (taxed splittable contributions)
West State Super (untaxed splittable employer contributions)

Previous financial year ending
30 / 06 / 20
Contributions to be split:
Nominated amount \$

OR

Current financial year
Contributions to be split:
Nominated amount \$

Note: if you are splitting contributions for the current financial year, you must be closing your account.

Complete and return the relevant 'Benefit access' form available at gesb.wa.gov.au/forms or by contacting your Member Services Centre on 13 43 72.

For more information on the amounts and types of contributions that can be split, read the 'Contribution splitting' fact sheet available at gesb.wa.gov.au/factsheets.

You should first check ATO online or contact the ATO to confirm the amount eligible for a split.

1 Your Commonwealth preservation age is dependent on your date of birth. For more information on your preservation age, read our 'Accessing your super' brochure available at gesb.wa.gov.au/brochures.

Section 5 Post to us

Please post the following documents:

- 'Contribution splitting' application form
- Original certified proof of identity for both spouses – refer to Section 6 for more information
- Relevant 'Benefit access' form if I have chosen to split current financial year contributions

to:

GESB
PO Box J 755
Perth WA 6842

How long will it take?

We aim to process your request within 10 working days after receiving your form and all necessary information. However, there are circumstances where it may take us longer to process your request.

Section 6 Completing your proof of identity

Both spouses

We are required to confirm your and your spouse's identities before you can split your contributions. See the 'Proof of identity' fact sheet, available at gesb.wa.gov.au/factsheets for more information.

Note: we have a privacy statement that explains how we handle information about individuals responsibly. Our privacy statement is available at gesb.wa.gov.au/privacy or can be obtained by contacting your Member Services Centre on 13 43 72.

How to contact us

T Member Services Centre 13 43 72 **F** 1800 300 067
PO Box J 755, Perth WA 6842

W gesb.wa.gov.au