

# Use this form if you want to split your before-tax (concessional) super contributions with your spouse. Print clearly in BLOCK LETTERS.

Before you start, here are some important points to consider:

- · Your spouse doesn't have to be a member of the Russell Investments Master Trust (the Fund).
- · Your instructions will apply to contributions made in the previous financial year.
- You cannot apply to split contributions made before the previous financial year.
- You are limited to one splitting application each financial year.
- The amount to be split is limited to the amount of your eligible account balances.
- If you have defined benefits, some contributions may not be eligible to be split.
- You can split concessional (before-tax) contributions as: 85% of Superannuation Guarantee contributions and 85% of any salary sacrifice contributions.
- Whether you split contributions to your spouse's account within the Fund or you split contributions to another fund, there is no fee.

#### **1. MEMBER DETAILS**

If you would like more details about how we collect, use and disclose your personal information, you can access the Trustee's privacy policy at russellinvestments.com.au/privacy or call us on 1300 926 626.

a.	Title (please select)														
	$Mr \square Mrs \square Ms \square Dr \square Other \square \rightarrow \square \square$														
b.	Surname														
c.	First name(s)														
d.	Date of birth (DD MM YYYY)e. Sex (please select)f. Member number														
	Male Female														
g.															
	State Postcode														
h.	Work telephone i. Home telephone j. Mobile number														
k.	Email address* (Give us your email address to receive all future communications electronically.)														

<sup>6</sup> By providing your email address, you are advising us that online communication is your preferred method of communication. Going forward, we will email you with information and also advise when a communication has been added to your online account. We will issue paper communications rarely or where your email address no longer works. You can change your preferred method of communication at any time by calling us or logging in to your online account at salaam.com.au/super/login

## 2. RECEIVING SPOUSE DETAILS

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#### 2. RECEIVING SPOUSE DETAILS (CONTINUED)

Are you transferring to a CMCCO

If your spouse has an SMSF, please complete the below details for your spouse's SMSF.

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<sup>1</sup> Your SMSF needs an ESA to receive SuperStream data. Without an ESA, you will not be able to roll money into your SMSF.

#### Transferring to an SMSF?

Super funds (including SMSFs) must use SuperStream to roll over your super benefits. This means your SMSF will need an electronic service address and an ABN. Make sure the SMSF details held with the ATO are correct before initiating the roll out request.

Under superannuation legislation, we can only transfer balances to a SMSF if you (or your company) are a member, trustee or director of a corporate trustee of the SMSF. For identification purposes, you'll also need to provide proof of identity documents detailed on this page and a copy of a bank statement for the SMSF. The bank statement must have been issued within 12 months and include the following:

- the SMSF name as account holder
- BSB and account number
- the institution name and logo.

We cannot process your request until this information is provided. We'll check with the ATO that the SMSF is complying. If we're unable to, we'll let you know. We'll verify with the ATO that:

The SMSF is complying.

AND:

• You are a member, trustee or director of a corporate trustee of the SMSF.

If you're a director of the corporate trustee, your details are registered with ASIC. You'll need to contact the ATO and update your fund details so we can confirm you're a trustee of your SMSF.

**Important!** We reserve the right to request additional information before processing any transfers to SMSFs. We may also contact you to confirm the details of this transfer request. Our information requirements for these payments reflect the unique regulations and risks pertaining to SMSFs, as well as the Trustee of the Russell Investments Master Trust obligation to ensure that transfers to these funds are compliant.

3. CONTRIBUTION SPLITTING DETAILS
Financial year ending (YYYY):   b. Concessional contributions to be split (nominated amount or percentage split):     \$   .00 OR   % p.a.
you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the rustee notice of your intention to claim a deduction before you lodge this form.

### 4. MEMBER DECLARATION AND SIGNATURE

I declare that:

- The information provided in this form is correct.
- A family law splitting or flagging order does not apply to my account.

Member signature	Date (DD MM YYYY)
Member name	

### **5. RECEIVING SPOUSE DECLARATION**

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect, use and disclose your TFN. The Trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the Trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

Declining to quote your TFN to the Trustee of your superannuation provider is not an offence. However, giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- · Your superannuation fund will be able to accept all permitted types of contributions to your account(s).
- Other than the tax that may ordinarily apply, you will not pay more tax than you need to—this affects both contributions to your superannuation and benefit payments 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.

Your TFN will otherwise remain confidential. Fill in your TFN here:

I declare that at the date of this application I am the spouse of the applicant and I am aged:

- less than my preservation age, OR
- between my preservation age and 65 years and have not retired from the workforce.

Spouse's signature												Dat	e (D	DM	1M )	۲YY	Y)									
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We're here to help

Please send your completed form to: Salaam superannuation, Locked Bag A4094, Sydney South NSW 1235.

If you have any questions, please call us on 1300 926 626 (Monday to Friday 8.30am to 5.30pm AEST),

email super@salaam.com.au visit salaam.com.au/super

In preparing this form, the Trustee has not taken into account the investment objectives, financial situation or needs of any person. Accordingly, before making a decision to invest in a product, you should read the current Product Disclosure Statement (PDS) and seek advice tailored to your own financial circumstances. Call us on 1300 926 626 or visit salaam.com.au/super for a copy of the PDS. Total Risk Management Pty Limited ABN 62 008 644 353, AFSL 238790, Trustee of the Russell Investments Master Trust ABN 89 384 753 567. Salaam superannuation is a division of the Russell Investments Master Trust.

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