





## 2. RECEIVING SPOUSE DETAILS (continued)

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

r. Are you transferring to a SMSF?

Yes  No

**Note:** If yes, we'll need to confirm with the Australian Taxation Office (ATO) that the self managed super fund is complying and you're a member, trustee or director of a corporate trustee of the SMSF. To help us verify this, refer to the section *Transferring to a self managed super fund?* below, including certified proof of identity requirements.

s. SMSF member number

t. Name of other fund

u. Other fund's ABN

v. Account name

w. Account number

x. BSB

y. Electronic Service Address (ESA)

<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 ensure that transfers to these funds are compliant.

## 3. CONTRIBUTION SPLITTING DETAILS

a. Financial year ending (YYYY):

b. Concessional contributions to be split (nominated amount or percentage split):

If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the Trustee notice of your intention to claim a deduction before you lodge this form.

