

## ClearView Superannuation and Roll-overs Contribution Splitting Application Form

In order for this application to be considered it must be signed and dated by the Member (Transferor Spouse) and Member's Eligible Spouse (Receiving Spouse) and received by the Trustee of the ClearView Retirement Plan.

Complete all sections and return this Application Form to:

**ClearView Superannuation and Roll-overs**  
**Reply Paid 3382**  
**SYDNEY NSW 2001**

Should you require further information regarding Contribution Splitting or assistance in completing this Contribution Splitting Application Form call ClearView on 132 977.

### Please read the following before completing this Contribution Splitting Application Form

1. A member can make an application to split contributions in the following two scenarios:
  - i. in the financial year following the year in which 'splittable contributions' are made; or
  - ii. in the same financial year that they are contributed immediately before a member rolls over or transfers their entire benefit.
2. Contributions may be split with an 'eligible spouse' on the following basis:
  - the maximum amount that may be split in a year is the lesser of 85% of the concessional contributions and the concessional contributions cap for the financial year.
  - non-concessional contributions made after 5 April 2007 cannot be split.
3. The following contributions are not splittable:
  - those subject to a family law payment split;
  - any that have been transferred or rolled over to a superannuation fund (this includes overseas superannuation benefits); and
  - those that have already been subject to an application for contribution split.
4. If at the date your application to split contributions is received by the Trustee, you will not be able to split contributions if your spouse is 65 years or older, or is aged between their relevant preservation age and 65 years, and is permanently retired from the workforce.
5. The minimum transfer and acceptance amount that can be subject to contribution splitting is \$5,000.
6. There must be a minimum balance of \$5,000 remaining in the Transferor Spouse's ClearView Superannuation and Roll-overs account after the contribution split.
7. A Member can only make one application to the Trustee to split contributions in a financial year.
8. If the Trustee agrees to split contributions the relevant amount will be transferred to either the Receiving Spouse's account in the Plan (if applicable) or to a complying superannuation fund or RSA as soon as is applicable and in any case within 30 Days.
9. If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must complete **Section 3** in this Application Form. Otherwise, you will not be able to claim a tax deduction in respect of the relevant contributions.

## Section 1. Member details (Transferor Spouse)

ClearView Account no.

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Surname

Given names(s)

Address

Postcode

Date of birth  /  /  Sex Male ☐ Female ☐

Daytime phone no.  Mobile no.

Email address

## Section 2. Contributions splitting details

Financial year ending 30 June  20

**Concessional contributions to be split** (85% maximum)

Dollar amount \$  or percentage  %

## Section 3. Section 290-170 Notice

If you made any personal contributions during the financial year noted in section 2, you must complete this section.

I acknowledge personal contributions to my ClearView Superannuation and Roll-overs account as follows:

**will be claimed** as a tax deduction under section 290-170 of the Income Tax Assessment Act 1936 (and therefore subject to 15% Contributions Tax), and

+

**will not be claimed** as a tax deduction.

=

is my **total** personal contribution for the financial year ending 30 June.

**I confirm** that the amount covered by this section 290-170 of the Income Tax Assessment Act 1936 Notice ('s2790-170 Notice'), which is Section 3 of this Form, has not been included in an earlier s290-170 Notice, and acknowledge that after this s290-170 Notice has been received by the Trustee it may not be withdrawn or revoked.

**I acknowledge** that if this Section 3 is not completed the Trustee will assume I am not claiming a tax deduction on any personal contributions.

## Section 4. Contribution Splitting instructions

The minimum contribution split is \$5,000. The minimum Transferor Spouse (Member) ClearView Superannuation and Roll-overs account balance must be at least \$5,000 immediately following your contribution split.

Tick which option you would like:

☐ I wish my contribution split to be deducted proportionally across all my investment options

or

☐ I wish my contribution split to be deducted from the following investment options (please complete below)

Investment option name	Amount	or Amount % (whole percentage)
Guarantee cash	\$ <input type="text"/>	<input type="text"/> %
Conservative	\$ <input type="text"/>	<input type="text"/> %
Cautious	\$ <input type="text"/>	<input type="text"/> %
Prudent	\$ <input type="text"/>	<input type="text"/> %
Assertive	\$ <input type="text"/>	<input type="text"/> %
Aggressive	\$ <input type="text"/>	<input type="text"/> %
Other	\$ <input type="text"/>	<input type="text"/> %
If Other, specify investment options(s) <input type="text"/>		
<input type="text"/>		
Total	\$ <input type="text"/>	<input type="text"/> 100%
(must total amount to be split)		

## Section 5. Receiving Spouse personal details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Surname

Given names(s)

Address

Postcode

Date of birth  /  /  Sex Male ☐ Female ☐

Daytime phone no.  Mobile no.

Email address

## Section 6. Member's Eligible Spouse's (Receiving Spouse) Complying Superannuation Fund details

Please Advise where the superannuation contribution split will be forwarded:

- A** ☐ Deposit the contributions split amount into my eligible spouse's (receiving Spouse) existing account in the ClearView Superannuation and Roll-overs account (please provide account number)

Receiving Spouse's account no.

Please indicate which investment options you wish to invest in. If no investment selection is made, investments will be allocated in accordance with the last known instructions of the Receiving Spouse.

Investment option name	Amount	or Amount % (whole percentage)
Guarantee cash	<input type="text"/>	<input type="text"/>
Conservative	<input type="text"/>	<input type="text"/>
Cautious	<input type="text"/>	<input type="text"/>
Prudent	<input type="text"/>	<input type="text"/>
Assertive	<input type="text"/>	<input type="text"/>
Aggressive	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
If Other, specify investment option(s) <input type="text"/>		
<input type="text"/>		
Total	<input type="text"/>	100%

(must total amount to be split)

OR

- B** ☐ Deposit the contribution split amount into a new ClearView Superannuation and Roll-overs account being established by my eligible spouse.

**Note:** Your spouse will need to complete an Application Form which is contained within the ClearView Superannuation and Roll-overs Product Disclosure Statement. Please attach the completed Application Form to this Contribution Splitting Application Form. Please note: the contribution split will only be accepted if your eligible spouse is accepted as a member of the ClearView Retirement Plan.

- C** ☐ Rollover the split amount to my eligible spouse's superannuation account with another institution. Please specify the institution, cheque payee and address to which the contribution split is to be sent.

Rollover institution

Fund's Australian Business Number (ABN)

Fund's Australian Superannuation Fund Number (SFN)

Superannuation Product Identification Number (SPIN)

Cheque Payee (name Trustee of Superannuation Fund)

Postal Address

Postcode

## Section 7. Member request and declaration

**I declare** that the information provided on this Contribution Splitting Application Form (including s290-170 Notice) is correct and confirm:

- once this Contribution Splitting Application Form has been accepted by the Trustee, it cannot be revoked.
- if the Trustee agrees to split contributions, subject to this Contribution Splitting Application Form, the Trustee will have fully discharged its obligations under the Trust Deed for the ClearView Retirement Plan and relevant law in respect of those contributions upon the transfer out of the Transferor Spouse's (Member) account in the ClearView Retirement Plan to the superannuation fund (which may be the ClearView Retirement Plan) for the Receiving Spouse.
- I cannot make any amendments to the s290-170 Notice (section 3), after the Trustee has received this Contribution Splitting Application Form.

**I understand** that the Trustee will not agree to split contributions, subject to this Contribution Splitting Application Form, if there are sufficient monies to meet any applicable requirements.

Name of Member (Transferor Spouse) (please print)

Signature 1

DATE / /

## Section 8. Receiving Spouse's declaration

**I declare** that at the Date of this application I am the spouse of the Member (Transferor Spouse) and:

- ☐ I am less than 55 years of age, OR
- ☐ I am between 55 and 65 years of age and have not retired from the work force.

Name of Receiving Spouse (please print)

Signature 1

DATE / /