

# Contribution splitting request

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281  
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

**Use this form to request a contribution split from your Macquarie Superannuation account.**

You do not need to complete this form if you are transferring from another account within the Macquarie Superannuation Plan.

**Important:** A number of requirements must be met to split contributions. Please consult your adviser or tax professional or visit our **Help Centre** for further information.

## 1. Member details

Account number

Member name

## 2. Contributions

### 2.A. Contribution details

Applicable for contributions made in the financial year ended:

**Contribution year** 30 June 20

**Contribution amount** \$

**Deduction amount\*** \$  
Covered by this notice

**Is this varying an earlier notice?** Yes\*\* No

\* If you have made multiple contributions in the year this notice will apply. If this notice covers multiple contributions, do not include any contribution covered by a previous notice this year.

\*\* The amount you intend to claim as a tax deduction cannot be greater than the amount stated in the earlier notice. However, you are able to lodge a new notice for contributions that have not previously been covered by a deduction notice.

### 2.B. Contribution split amount

Applicable for contributions made in the financial year ended:

**Contribution year** 30 June 20

Contributions made in the current financial year may only be split if you are withdrawing, rolling over or transferring out all funds from your portfolio.

**Contributions-split amount (the total amount that will be allocated to your spouse's account)**

**Taxed splittable** \$

The contributions split-amount will be received in your spouse's superannuation fund/account as Preserved funds. Unless requested in the special instructions on the following page, the Contributions-split amount will be drawn from your account in the following order: Preserved funds, restricted non-preserved funds, then unrestricted non-preserved funds.

---

### 3. Receiving spouse details

---

<b>Spouse name</b>	Given name(s):		
	Surname:		Date of birth:
<b>Spouse address</b>	Street number and name:		Suburb:
	State:	Postcode:	Country (if outside Australia):
<b>Spouse contact details</b>	Email address:		
	Contact number:		

### 4. Receiving spouse fund details

---

<b>Split to an existing Macquarie account?</b>	Yes. Macquarie account number:		
	No. Provide external account information below:		
<b>External account details</b> (if applicable)	Superannuation fund name:		
	Street address or PO Box:		
	Suburb:	State:	Postcode:
	Fund phone number:	SPIN:	ABN:
	SFN:		Account number:

### 5. Declaration and signatures

---

I declare and acknowledge that:

- I agree to be bound by the spouse contribution splitting terms and conditions
- the contribution amounts stated above are to be split to my spouse's superannuation account
  - upon completion of my split request I am unable to submit a section 290-170 notice to vary a deduction for personal super contributions in respect of concessional contributions that have been split
- the person I have chosen to receive the split contributions is either:
  - another person to whom I am legally married
  - another person (whether of the same sex or a different sex) with whom I am in a relationship that is registered under a law of a State or Territory, or
  - another person to whom I am not legally married, but who lives
- I agree to retain the original form if I am submitting this form to Macquarie via electronic means and will provide to Macquarie upon request
- the information provided on this form is correct and confirm that the amount to be split is within the legislatively specified limits.

---

## 5. Declaration and signatures (continued)

---

### **If you have not previously lodged a notice with the fund for the contribution amounts specified in section 2A.**

I confirm:

- I am lodging this notice before both of the following dates:
  - the day that I lodged my income tax return for the year stated in section 2A, and
  - the end of the income year after the year stated in section 2A
- at the time of completing this notice:
  - I intend to claim the personal contributions stated in section 2A as a tax deduction
  - the trustee has not begun to pay a pension based in whole or part on these contributions
  - I have not included these contributions in an earlier notice
- I understand that if I choose to vary this notice, I cannot increase the amount I intend to claim as a tax deduction, and
- the information given on this form is correct and complete.

### **If you have already lodged a notice with the fund for the contribution amounts specified in section 2A and wish to reduce the amount stated in that notice.**

I confirm:

- I intend to claim the personal contributions stated in section 2A as a tax deduction
- I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice.

I confirm that either:

- I have not yet lodged my income tax return for the year stated in section 2A and this variation notice is being lodged on or before 30 June in the financial year following the year stated in section 2A, or
- the Tax office has disallowed my claim for a deduction for the relevant year stated in section 2A and this notice reduces the amount stated in my previous notice by the amount that has been disallowed. In the event that the disallowance is reversed, I agree to inform the trustee and acknowledge that this variation will be ineffective, and
- the information given on this form is correct and complete.

### **If your account contains UK sourced benefits transferred after 6 April 2015.**

I agree that the statutory and regulatory requirements that Macquarie Investment Management Limited must comply with for the fund to be a Qualifying Recognised Overseas Pension Scheme is to apply to my interest in the fund. This means that I will not be able to be paid any UK transfer amount prior to me reaching the age of 55 unless the scheme administrator has received evidence from a registered medical practitioner that I am (and will continue to be) incapable of carrying on my occupation because of physical or mental impairment and I have ceased to carry on my occupation.

Accordingly, prior to that time I will not be able to access my benefits even if I have satisfied a condition of release such as:

- terminal medical condition
- termination of gainful employment with a standard employer sponsor of the fund (where the member's preserved benefits are less than \$200 at the time of termination)
- severe financial hardship
- compassionate grounds
- termination of gainful employment with employer who contributed to fund in relation to the member
- temporary incapacity, and
- lost member with a benefit of less than \$200.

Member signature

Date

---

## 7. Spouse declaration and signature

---

I declare that:

- I agree to be bound by the spouse contribution splitting terms and conditions
- the information I have provided on this form is true and correct, and
- I am aged:
  - less than preservation age, or
  - between my preservation age and 65 years and have not yet retired.

Spouse signature

Date



---

### Sign

- Wet signature
- Electronic signatures are not accepted on this form.

---

### Submit

-  Upload to **Request Centre** (advisers only)
-  Email to [wrapolutions@macquarie.com](mailto:wrapolutions@macquarie.com)

---

### Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online  
If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063