

Spouse Deposit Form

When to use this form

Use this form to make a contribution to your spouse's QSuper Accumulation account. If your spouse is not already a member of QSuper, they will need to join by opening an Accumulation account. They can easily join through our website at qsuper.qld.gov.au or by completing the *Open an Accumulation Account* form, at the back of our *QSuper Product Disclosure Statement for Accumulation Account*.

Important information

- If you are making the contribution, you are the *contributing spouse*
- If the contribution is being made on your behalf, you are the *receiving spouse*.

Before completing this form, please read the additional information on page 3.

You can make a spouse contribution by:

- **BPAY®** using the 'Spouse contributions' details listed on the **receiving spouse's** annual statement, or available through the receiving spouse's Member Online. Please **do not** use the BPAY details of the contributing spouse.
- **Cheque or money order**, made payable to QSuper. Please make sure cheques are crossed and marked 'not negotiable'.
- **EFTPOS and cash** (up to \$1,000) contributions are accepted at our Member Centres.

Please complete in **BLOCK** letters, using blue or black ink.

1 Personal details – receiving spouse

Your client number can be found on your annual statement or by logging in to Member Online.

Tell us the account you want the contribution paid into.

Client number

Title

First names

Last name

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy)

 / /

Home phone number

Mobile phone number

Work phone number

Email address

Residential address

State

Postcode

Postal address

Same as residential address

State

Postcode

Please choose which one of the following describes you so you can receive this spouse contribution.

I am 66 years old or younger.

OR

I am aged 67–74, and **I have met the work test** by working at least 40 hours over 30 consecutive days in the current financial year² (the financial year you are receiving this contribution).

OR

I am aged 67–74, and **I have met the work test exemption** by meeting the work test in the previous financial year, having a total superannuation balance below \$300,000 at 30 June of the previous financial year, and I have not made or received a work test exemption contribution in any previous financial year.²

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1 If your name has changed and you work for the Queensland Government or default employer, let your payroll office know and they will then let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.

2 For more information, please refer to the *Personal Contributions Guide*.



2 Contributing spouse details

Title	First names
<input type="text"/>	<input type="text"/>
Last name	
<input type="text"/>	
Date of birth (dd/mm/yyyy)	
<input type="text"/>	<input type="text"/>
Client number (optional)	
<input type="text"/>	

3 Providing your Tax File Number

Under the *Superannuation Industry (Supervision) Act 1993*, your super fund is authorised to collect your tax file number (TFN), which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. If you transfer your super to another fund we may disclose your TFN to the other super provider unless you tell us not to in writing. It is not an offence not to quote your TFN. However, providing your TFN to your super fund will have the following advantages (which may not otherwise apply):

- Your super fund will be able to accept all types of contributions to your account(s)
- The tax on employer contributions to your super 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 super benefits
- It will make it much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

Receiving spouse's TFN

If you have already provided your TFN you do not need to provide it again.

4 How would you like this deposit invested?

Spouse contribution amount

 \$

- Invest this contribution according to my current investment preference or use the default option.
- OR
- Invest this contribution in the following way:

Investment option	Amount	OR	Percentage
<input type="checkbox"/> Lifetime	\$ <input type="text"/>	OR	<input type="text"/> %
<input type="checkbox"/> Moderate	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Balanced	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Socially Responsible	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Aggressive	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Cash	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Diversified Bonds	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> International Shares	\$ <input type="text"/>		<input type="text"/> %
<input type="checkbox"/> Australian Shares	\$ <input type="text"/>		<input type="text"/> %
Total <small>(must add up to 100%)</small>	\$ <input type="text"/>		<input type="text"/> %

Before you choose how you want your money invested, read our *Investment Choice Guide* available on our website at qsuper.qld.gov.au or call us and we'll send you a copy.

If you do not tell us how you want your money invested, or you make your contribution via BPAY, we'll invest it according to your investment strategy for future contributions. If you are not sure what your investment strategy is, you can find out on your annual statement, through Member Online, or by calling us.

Don't forget some limits apply when it comes to how much you can add to your super – they're called contribution caps, and you'll be charged extra tax if you go over them. You can find more info in our *Accumulation Account Guide*. Go to qsuper.qld.gov.au or call us and we'll send you a copy.

Contribution caps

The annual non-concessional contributions cap is \$100,000. You can find more information in our *Personal Contributions Guide*, available on our website at qsuper.qld.gov.au or call us to request a copy.

5 Declaration and authorisation

Both the contributing and receiving spouse must sign this section. You can find our definitions of spouse in the *Additional information about this form* section.

Receiving spouse

- We live together in a relationship on a permanent basis that meets the spouse definition.
- I have read and understand the *Additional information about this form* section of this form.
- I understand the rules and conditions for deposits to my account and I accept that my deposit must generally be locked away (called preserved) in my super account until I retire after reaching the age I can access my super.
- I understand this contribution isn't eligible to be assessed for the Australian Government co-contribution.
- The information I've given on this form is true and correct.
- I understand that this deposit can only be applied to my account if you have my TFN.

Signature

(Please sign in blue or black pen – QSuper does not accept electronic signatures on this form)

Date signed (dd/mm/yyyy)

 / /

Contributing spouse

- We live together in a relationship on a permanent basis that meets the spouse definition.
- I confirm I am making this contribution as the contributing spouse, for my spouse.
- I understand that in making this contribution on behalf of my spouse (as defined), it belongs to my spouse and I have no further claim to the money.

Signature

(Please sign in blue or black pen – QSuper does not accept electronic signatures on this form)

Date signed (dd/mm/yyyy)

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Additional information about this form

Definition of a spouse

A spouse includes someone you are in a registered relationship with, or someone you are living with on a genuine domestic basis in a relationship as a couple (including a same sex relationship).

Government co-contribution

Keep in mind that spouse contributions are not eligible for the super co-contribution and they do not attract employer super guarantee payments.

Claiming a tax offset

A contributing spouse may be able to claim a tax offset in certain circumstances. You can find more info about this in our *Accumulation Account Guide*, available on our website at qsuper.qld.gov.au or call us to request a copy.

Investing your super

When you invest in super, you are actually purchasing units in a given investment option. The unit prices go up and down each day, in much the same way that a share does, based on movements in the market value. As the unit price changes, so does the overall value of your investment.

If we receive your deposit by 12pm, that day's unit price for your investment options will be applied. For deposits we receive after 12pm, the next day's unit price will be applied. Any deposits received by EFTPOS or BPAY® will have the unit price for the day the deposit is received applied.

We do reserve the right to temporarily suspend unit prices at any time if there is extreme market volatility or if circumstances outside of our control mean we can't set a unit price. If we do need to suspend a unit price, we'll let you know on our website.

Member Centres**70 Eagle Street, Brisbane****63 George Street, Brisbane****Sunshine Coast University Hospital**, Ground Floor,
Main Hospital Building, 6 Doherty Street, Birtinya**Member Services team****Phone** 1300 360 750**Overseas** +61 7 3239 1004

Monday to Friday 8.00am – 6.00pm (AEST)

Postal address GPO Box 200, Brisbane QLD 4001**Email** qsuper@qsuper.qld.gov.au**Fax** 1300 242 070**Website** qsuper.qld.gov.au

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