

Spouse contribution form



AVOID PROCESSING DELAYS

Check you're using the latest version of this form. Compare the issue date at the bottom of this page with the version available at unisuper.com.au/forms.

Complete this form if you (referred to as the 'contributing spouse') want to make a spouse contribution by cheque on behalf of your spouse who is a UniSuper member.

Important information

We can only accept your contribution as a spouse contribution if your spouse meets the 'spouse' definition for a UniSuper member.

The definition of a spouse is:

- a person who is legally married to the contributing spouse
- a person, whether of the same sex or opposite sex, with whom the contributing spouse is in a relationship that is registered under an Australian State or Territory Law, or
- a person, whether of the same sex or opposite sex, who's in a relationship with the contributing spouse and isn't legally married but who lives with the UniSuper member on a genuine domestic basis as a couple.

Tax file number

We can't accept any spouse contributions on behalf of a member who hasn't provided their tax file number (TFN).

Eligibility criteria

We can only accept spouse contributions on behalf of a UniSuper member who meets one of the following criteria.

Spouse contributions for UniSuper members aged less than 65

If your spouse is aged less than 65, you can make spouse contributions on their behalf, regardless of their employment status.

Spouse contributions for UniSuper members aged between 65 and 69

If your spouse is aged between 65 and 69, you can only make a spouse contribution on their behalf if they've been gainfully employed for at least 40 hours in a period of 30 consecutive days in the financial year in which the contribution is made. We can't accept spouse contributions if your spouse is aged 70 or older.

How to contribute using BPAY®

You can easily make after-tax contributions to your spouse's UniSuper account using these BPAY® details:

Biller code: 78535

Reference: <Spouse's member number>

If your spouse's member number starts with 137, 138, 139, 140, 141, 142 or 143, you may need to use a unique BPAY® Customer Reference Number, which you can get online at unisuper.com.au/bpay-customer-reference-number-generator.

Note that you don't need to complete this form if you contribute using BPAY®.

Registered to BPAY® Pty Ltd ABN 69 079 137 518

How to contribute by cheque

If you're making a personal contribution by cheque, please note that cheques must be either:

- a personal cheque drawn on an account in your name (either own or joint)
- a bank cheque.

Spouse contributions can't be made with a third-party cheque.

Contributions will be invested in your spouse's chosen investment option(s). If your spouse hasn't chosen an investment option, the contribution will be invested in our default investment option, the Balanced option.

Cheques should be made payable to UniSuper Limited.

Contributions caps

The government has imposed caps on the total amount of contributions that can be made into super each financial year. It is a member's responsibility to monitor the amount of contributions made to their account to ensure the cap is not exceeded.

Spouse contributions are not eligible for government co-contributions.

Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. For more information on how we collect and manage your information please refer to the Privacy statement at the end of this form.

SECTION 1 — UniSuper member details

Please use BLACK or BLUE BALLPOINT PEN and print in CAPITAL LETTERS. Cross where required **X**

UniSuper member number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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SECTION 2 — Contributing spouse details

Please provide your details.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Contact number (during business hours)
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SECTION 3 — Spouse contribution

To make a spouse contribution on behalf of your spouse, you'll need to declare that your spouse meets the eligibility criteria.

I declare that my spouse is:

- aged less than 65.
- aged 65 or older but less than 70, and has been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year.

I wish to make a lump-sum spouse contribution in the amount of:

\$, , .

Go to SECTION 4

 RETURN YOUR COMPLETED FORM AND CHEQUE
MADE PAYABLE TO UNISUPER LIMITED TO:

UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000

 NEED HELP?

For more information:

- ✉ email enquiry@unisuper.com.au, or
- ☎ call 1800 331 685.

SECTION 4 — Declaration

Please read this declaration before you sign and date your form.

- I declare the information I've given on this form is true and correct.
- I confirm that my spouse meets the definition of a spouse for a UniSuper member (see 'Important information' on page 1).
- My spouse has consented to me making the spouse contribution.
- I acknowledge that the spouse contribution will be invested according to my spouse's chosen investment option(s) and will be preserved in the superannuation system until a 'condition of release' is met.
- I understand that spouse contributions are not eligible for government co-contributions.
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

Date (DDMMYYYY)

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at unisuper.com.au or by calling us on 1800 331 685.