

# Additional Personal Contributions – Deposit

## Important information about this form

## **Get the facts first**

Before completing this form, please read the **MilitarySuper Product Disclosure Statement (PDS)** and the **Additional personal contributions** factsheet which is available from our website **csc.gov.au** 

## Who should use this form?

Use this form if you are a current contributing member of Defence Force Retirement and Death Benefits Scheme (DFRDB) or MilitarySuper and you wish to make personal superannuation contributions (after tax contributions) in addition to your regular fortnightly contributions.

## When to use this form

You must use this form each time you make an additional personal contribution by cheque, money order or EFT payment direct to MilitarySuper.

### Tax file number

We are required to validate your Tax File Number (TFN) with the ATO's records to confirm the TFN provided is yours and is correct. Please note, if you have not provided MilitarySuper with your TFN, we will be unable to accept your additional personal contributions.

If you have not been issued a TFN you should lodge an Australian Taxation Office Application/Enquiry form with the Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

## **Contributions Cap**

There is a cap on non-concessional contributions. Any after-tax contributions up to the cap are paid in tax-free. Any after-tax contributions above this cap will be taxed at the top marginal tax rate

(plus Medicare levy). Information on the current cap limits can be found on the Australian Taxation Office website. Please note that your member contributions to DFRDB or MilitarySuper count towards the non-concessional cap.

#### For more information

For more information about additional personal contributions or how to complete this form please contact us on 1300 006 727 (MilitarySuper) or 1300 001 677 (DFRDB).

## How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this ☐ with a ✓ or **x** then fill out the next question or section.

### **Submitting your form**

Return your completed form with your cheque or money order attached to:

MilitarySuper GPO Box 2252

Canberra ACT 2601

**Australia** 

Or if you're paying via EFT, please email the completed form to: formsandapplications@csc.gov.au



Military Superannuation & Benefits Scheme



#### **Important:**

MilitarySuper members are not eligible to claim a deduction for Personal Super Contributions made to this fund as MilitarySuper is a Commonwealth public sector superannuation Defined Benefit Scheme.

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# Additional Personal Contributions – Deposit

# Form start

Read each section of the form carefully before filling it in.



## **About** yourself

1.	Service	Navy	Army	RAAF
2.	Scheme	MilitarySuper	DFRDB	
3.	Service number/Employee ID			
4.	Salutation	Mr Mrs	Ms Miss	Other
	Surname			
	Given name(s)			
5.	Date of birth	D D M M	/	
6.	Address	Postal address		
		Suburb		State Postcode
7.	Phone number	Business hours		
7.	Phone number			
		After hours		
		Mobile number		
8.	Email address			
		@		





I wish to pay the additional personal contributions of:

Amount in words																		
Dollar amount	\$																	
Method of payment		Che	que			] M	one	y Ord	der		E	FT F	Payr	nen	t			

If you're paying via Electronic Funds Transfer (EFT), please use the bank account details below:

BSB: 092009

Account Number: 919128 Account Name: MSBS Fund

Bank Name: Reserve Bank of Australia

Please note: When making the EFT payment please provide your service number/employer ID as the reference number

and email the EFT payment details to Accounts.Receivable@csc.gov.au



## **Identification Requirements**

To confirm your identity, we require some information from you—this is to protect your benefit against fraud, money laundering and terrorism financing, under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

## Verifying your documents

Identifying documents may be verified through the Document Verification Service (DVS). DVS is a national online system that allows approved government agencies and organisations to compare a member's identifying information with a government record. It is not a database and does not store any personal information. Requests to verify a document are encrypted and sent via a secure communications pathway to the document issuing authority for checking.

If you don't provide authorisation to have documents verified electronically or your documents are incompatible with DVS, you will need to provide certified copies of required documents. Please also refer to the section Certifying your documents.

An electronic copy of your identification documents will be stored in a secure environment and hard copies will be securely stored off-site. All copies will only be used for the purpose of confirming your identity. You need to send in identification with every application.

DVS is only compatible with some identification documents, these have been listed below.

## **Certifying your documents**

If you're providing certified documents, the certifying authority must confirm in writing you are the valid holder of the identification you are presenting, and any copies are true copies of the original.



IMPORTANT: The certification must include the name, signature, qualification and registration number of the certifying authority (if applicable), and the date of the certification.

The following sample of certifying authorities can certify your documents in Australia:

- Employee of a Commonwealth authority engaged on a permanent basis with five or more years of continuous service who is not specified elsewhere in this document
- Financial Adviser or Financial Planner
- Justice of the Peace (JP)
- · Legal Practitioner
- Medical Practitioner
- Member of the Australian Defence Force who is:
  - · an Officer; or
  - a Non-Commissioned Officer within the meaning of the Defence Force Discipline Act 1982 with five or more years of continuous service; or
  - a Warrant Officer within the meaning of that Act.

Please note: We require a copy of both sides of your identification document.

- Midwife
- Notary Public
- Nurse
- · Occupational therapist
- Physiotherapist
- · Psychologist.

For a full list of certifying authorities refer to Schedule 2 of the Statutory Declarations Regulations 2018 available at www.legislation.gov.au/Details/F2018L01296

## How can I meet the identification requirements?

You only need to provide one document from the Primary photographic identification category. If you can't provide any Primary photographic identification you will need to provide one secondary identification document from List A AND one secondary identification document from List B. We can only accept documents that are listed below for identification purposes.

If the name we hold on file for you is different to the name on your identification, or two pieces of identification are in different names, please provide a certified copy of your Marriage or Change of Name certification.



If you would like us to use DVS to verify your identification, please provide authorisation by placing a check in the box below.

I confirm that I am authorised to provide the personal details presented and I consent to the information being checked with the document issuer or official record holder via third party. systems for the purposes of confirming my identity.



You must provide a copy\* of one of the following:

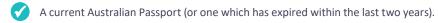
## Primary photographic identification

DVS compatibility is shown as or S









A current Australian Proof of Age card (issued under a State or Territory law).

If your documents are incompatible with DVS,

## Secondary identification requirements

Only provide these documents if you're unable to provide one of the Primary photographic identification documents.

## List A

Your Australian Birth Certificate or extract issued by a State or Territory. Please note: Birth Certificate extracts and Birth Certificates issued before 1970 may not be verified by DVS.

Your Citizenship Certificate issued by the Commonwealth.

Your current Pensioner Concession Card issued by the Department of Human Services.

#### List B

Your notice issued by the Australian Taxation Office (ATO) within the last 12 months that shows your name, current residential address, and records an amount payable either to or from the ATO.

Your notice issued by a local council or utilities provider in the last three months showing the provision of services and current residential address. For example: rates notice, electricity or water bill.

Your notice issued by the Commonwealth or a State or Territory government within the last 12 months showing your name and current residential address, and the provision of a financial benefit. For example: a Centrelink letter.

### **Certifying your documents overseas**

If you live overseas and need to have documents certified, it needs to be done by a person in a foreign country who is authorised by law in that jurisdiction to administer oaths or affirmations or to authenticate documents. For more information refer to ag.gov.au and dfat.gov.au. Documents provided in a foreign language must be accompanied by a certified translation completed by an accredited translator.

Persons residing overseas and foreign residents may need to contact us.

\*Don't send original documents.

don't forget to provide certified copies.



## **Tax File Number**

Providing your TFN is voluntary. If you choose not to provide it you will not commit an offence. The consequences of not providing your TFN are:

- tax will be deducted from your benefit/s at the highest marginal rate
- the trustee of another superannuation scheme or RSA provider holding your benefits now or in the future may not be able to locate, amalgamate or identify your benefits in order to pay you.

Note that these consequences may change in the future as a result of legislative change.

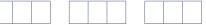
We are authorised to collect your TFN under the provisions of the *Superannuation (Supervision) Act* 1993. We will treat your TFN as confidential and will only use it for legal purposes, which include:

- disclosing it to the trustee of an eligible superannuation entity, regulated exempt public sector superannuation scheme or RSA provider to which your benefits are transferred in the future, unless you specifically instruct us not to
- · finding or identifying your superannuation benefits where other information is insufficient
- calculating tax on your benefits
- providing information to the Commissioner for Taxation.

Note that the lawful purposes may change in the future as a result of legislative change.

We are required to validate your Tax File Number (TFN) with the ATO's records to confirm the TFN provided is yours and is correct. Also please note that without your TFN we cannot accept any additional personal contributions or member contributions. If you have already provided your TFN to MilitarySuper, you are under no obligation to provide it again in this application.

Your	Tax	Fil	е	N	um	her



Your Tax File Number remains confidential



## **Signature**

1. Please credit the attached payment to my MilitarySuper account.



Sign

Signature	

Date	e sig	ned							
D	D		M	M		Υ	Υ	Υ	Υ
		/			/				
		/			/				



## **Privacy**

12.

I do not want my contact details passed to an independent firm commissioned for the purpose of participating in research on the service provided by CSC.

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via csc.gov.au or by contacting us on 1300 006 727, for the purpose of managing your super. This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.

#### You have now completed this form.

Return your completed form with your cheque or money order attached to:

MilitarySuper GPO Box 2252 Canberra ACT 2601 Australia





Email members@enq.militarysuper.gov.au



**Phone** 1300 006 727



Fax (02) 6275 7010



MilitarySuper GPO Box 2252 Canberra ACT 2601



