



Splitting your contributions

Important information about this form

Use this form to

Provide us with instructions to split your contributions to be transferred into your spouse's super fund. You should fully consider the fees and other costs that may apply before taking action. More information on fees and other costs related to your ADF Super account is available in the **ADF Super PDS** at csc.gov.au

It is important to ensure that your remaining account balance after your contributions have been split is sufficient to pay any insurance premiums or your insurance cover may lapse (if applicable).

What is contributions splitting?

Contributions splitting allows you to transfer or rollover a portion of the concessional contributions you recently made to your super account to your spouse's super account.

For this application, the definition of a spouse includes a person:

- you are legally married to
- you are in a relationship with that is registered under certain state or territory laws (including registered same-sex relationships)
- of the same or of a different sex, who lives with you on a genuine domestic basis in a relationship as a couple (known as a 'de facto spouse').

When can you apply to split your contributions?

You can apply to split your contributions when you are any age, but your spouse must be either:

- less than the preservation age that applies to them
or
- aged between their preservation age and 65 years, and not retired.

You lodge this application with us in the:

- financial year immediately after the financial year in which the contributions were made
 - financial year the contributions were made, only if you are closing your ADF Super account.
- Please also complete an **ADF Super Withdraw your super** form.

What contributions can be split?

You can request to transfer up to 85% of a financial year's concessional contributions including:

- any before-tax contributions your employer made for you
- any salary sacrifice contributions.



For more information on contributions splitting and any relevant concessional contributions caps which may apply, you can visit www.ato.gov.au/Forms/Contributions-splitting/

It is important to note that contribution splitting does not reduce the amount counted towards your concessional contributions cap. We report all the contributions to the ATO that were made to your fund including any contributions that were later transferred to your spouse after a contributions splitting application.

What contributions cannot be split?

Any contribution that are not concessional contributions. For example, splitting is not available for personal contributions that you cannot claim a deduction for.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

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



Australian
Defence Force
Superannuation

➡ About this form continued on next page

Submitting your form

Please send this form with your certified proof of identity documents (if applicable) to:

ADF Super
Locked Bag 20116
Melbourne
VIC 3001

or

email to:

formsandapplications@adfsuper.gov.au



Provide your personal details

ADF Super membership number

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Surname

Given name(s)

Date of birth

D	D					M	M					Y	Y	Y	Y

 / /

Postal address

SUBURB

STATE

POSTCODE

Contact details

MOBILE NUMBER

BUSINESS HOURS

AFTER HOURS

Email

WORK

@

HOME

@

Tax File Number

☐ I have already provided my TFN to ADF Super. You can check this by logging into **ADF Super Member Online** or under the 'Your details' section of your **Member Statement**

ADF Super is authorised to collect and validate your Tax File Number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. To improve the electronic transfer of funds between superannuation providers, ADF Super is required to validate your TFN with the Australian Taxation Office (ATO). In the event that your TFN cannot be validated, or you do not wish to provide your TFN, you will be required to provide identification in accordance with **Section E**.

B Receiving spouse details

Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="text"/>
Surname	<input type="text"/>
Given name(s)	<input type="text"/>
Date of birth	<div> <div> <div>D</div> <div>D</div> </div> <div>/</div> <div> <div>M</div> <div>M</div> </div> <div>/</div> <div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div> </div> </div>
Postal address	<input type="text"/>
	<input type="text"/>
	<div>SUBURB</div> <div>STATE</div> <div>POSTCODE</div>
Contact details	<div>MOBILE NUMBER</div> <div>BUSINESS HOURS</div> <div>AFTER HOURS</div>
Email	<div>WORK</div> <div>@</div> <div>HOME</div> <div>@</div>
Tax File Number	<input type="text"/>

C Receiving spouse super fund details

ADF Super membership number (if applicable)	<input type="text"/>
or	
Name of the fund you want to transfer your benefit to	<input type="text"/>
	<input type="text"/>
	Please provide the name exactly as per your last statement or contact the fund for the correct details.
ABN of fund	<div>AUSTRALIAN BUSINESS NUMBER</div> <div><input type="text"/></div>
Your Member Client Identifier at the fund	<input type="text"/>
USI of fund	<input type="text"/>

USI = Unique Superannuation Identifier

Important: this transfer cannot be processed without the USI number

POSTAL ADDRESS																			
SUBURB										STATE					POSTCODE				

Which financial year do you wish to split contributions from and how much do you wish to split?

If you are closing your ADF Super account, you can request to split from the current financial year:

*A maximum of 85% of your concessional contributions can be split

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*.

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.

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.

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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:

- Dentist
- 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.
- 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

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

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 

-  A current Australian Driver's Licence (front and back of licence must be provided).
-  A current Australian Passport (or one which has expired within the last two years).
-  A current Australian Proof of Age card (issued under a State or Territory law).

If your documents are incompatible with DVS, don't forget to provide certified copies.

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.**

F Declare and sign this form

By signing this form I am making the following statements:

- the information I have provided on this form is true and correct
- I have read the **ADF Super PDS**, and this application is made subject to the terms and conditions of that information
- I have provided certified proof of identity documents (if applicable) to prove my identity

 **Sign**

SIGNATURE

Date of declaration

D	D		M	M		Y	Y	Y	Y

G Your spouse's declaration

I declare that at the date of this application I am the spouse of the applicant and I am either:

- less than my preservation age
or
- my preservation age to 74 years old and not retired.

 **Sign**

SIGNATURE

Date of declaration

D	D		M	M		Y	Y	Y	Y



Lodgement

You have now completed this form.

Please send this form with your certified proof of identity documents (if applicable) to:

ADF Super
Locked Bag 20116
Melbourne
VIC 3001

or

email to:

formsandapplications@adfsuper.gov.au

Your privacy is important to us

We're committed to protecting your privacy. We collect your personal information for the purposes of providing superannuation services to you, improve our products and to keep you informed. We will only share your personal information where necessary for providing superannuation services to you. This may include disclosing your personal information to our scheme administrator, service providers or government or regulatory bodies. Your personal information may be accessed overseas by our service providers. Please see our privacy policy for full details. Your personal information will not be otherwise used or disclosed unless required or permitted under law.

A full copy of our privacy policy as well as the privacy complaint process is available at **csc.gov.au**

End Form



Need assistance?
Call us on the phone
numbers below



Email
members@adfsuper.gov.au



Phone
1300 203 439



Fax
1300 204 314



Post
ADF Super
Locked Bag 20116
Melbourne
VIC 3001



Web
csc.gov.au



Overseas Callers
+61 2 4209 5401