



Perpetual's DIY Super

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

This form can be used by members of the Self Managed Super Fund Service and members of the Small APRA Fund Service.

CONTRIBUTION DETAILS - EMPLOYERS

superannuation fund name				
account number				
member name				
employer name				
total contribution amount	\$			
contribution frequency	one-off	monthly	quarterly	annually
SG contribution	\$		employer salary sacrifice contribution	\$
personal after-tax contribution	\$		employer other contribution	\$
member name				
SG contribution	\$		employer salary sacrifice contribution	\$
personal after-tax contribution	\$		employer other contribution	\$
member name				
SG contribution	\$		employer salary sacrifice contribution	\$
personal after-tax contribution	\$		contribution	\$
member name				
SG contribution	\$		employer salary sacrifice contribution	\$
personal after-tax contribution	\$		employer other contribution	\$

SG contribution – These are employer contributions which are compulsory under superannuation legislation.

Employer salary sacrifice contribution – These are amounts paid by the employer (in addition to SG contributions).

Employer other contributions – These are amounts paid by the employer and are not SG or salary sacrifice contributions.

Personal after-tax contribution – Contribution made by the member for which a tax deduction is not claimed (also known as a non-concessional contribution).

Note: Please refer to the relevant Product Disclosure Statement or Administration Service Guide and Continuous Disclosure and Important Information updates available on our website for further information on contribution caps.

Are you an Australian resident for tax purposes?	yes	no
signature of member/employer		date



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CONTRIBUTION DETAILS - INDIVIDUALS

(To be completed by the person for whom the contribution is being made)

superannuation fund name			
account number			
member name			
cash contribution amount	\$	in specie contribution amount	\$

Contribution break-up

total contribution	\$	spouse contribution	\$
personal non-concessional contribution	\$	personal concessional contribution	\$

Personal concessional contribution – contributions made by the member for which they intend to claim a tax deduction (see below).

Personal non-concessional contribution – contributions made by the member for which a tax deduction is not claimed (also known as after-tax contribution).

Spouse contribution – contributions made by a member's spouse. The contribution counts as a non-concessional contribution for the receiving spouse.

Note: Please refer to the relevant Product Disclosure Statement or Administration Service Guide and Continuous Disclosure and Important Information updates available on our website for further information on contribution caps.

Tax deduction for personal contributions

I am eligible and intend to claim a tax deduction for my personal contributions of: \$

This is your notice to us, to be effective from the later of the date of this application or the date that you become a member of the fund, of the amount you intend to claim as a tax deduction in relation to Section 290-170 of the Income Tax Assessment Act 1997. We will deduct 15% contributions tax from this amount. This notice will be applicable for the current year unless you notify us in writing of your intention to vary this notice. We will send you an acknowledgement of the amount you wish to claim as a tax deduction which you will need to retain for tax purposes.

Note: We will contact you each year to confirm if you intend to claim a tax deduction for any personal contributions. You cannot claim a tax deduction or request to alter a previous tax deduction notification if you have commenced a pension using all or part of the contribution you wish to claim or alter.

ELIGIBILITY TO CONTRIBUTE

- If applicable, I declare that I am eligible to make a personal contribution and acknowledge that I am aged less than 67; or that I am aged 67 years or over but under age 75 and in the current financial year have worked in paid employment for at least 40 hours in a period of not more than 30 consecutive days or meet the work test exemption.
- If I am aged between 67 and 74 and my employer is making voluntary contributions (including salary sacrifice) on my behalf, then I declare that in the current financial year I have worked in paid employment for at least 40 hours in a period of not more than 30 consecutive days or meet the work test exemption.
- If applicable, I am eligible to receive spouse contributions and acknowledge that I understand and satisfy the legislative requirements for such contributions.

Are you an Australian resident for tax purposes?	yes	no
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signature of member		date
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