



## Step 3 – Personal details of spouse receiving your contributions

Title Mr  Mrs  Ms  Miss

Date of birth   /   /

Given names

Surname

Street address

Suburb

State

Postcode

Daytime telephone

 - 

Mobile

 - 

### Details of spouse's super fund

The details below will help us identify your spouse's super account. It is important to complete all details as the trustee may not be able to process your request otherwise.

Membership number\*

Fund name

Fund address

Telephone

 - 

Fund ABN number\*

 -  -  - 

SPIN\*

 -  - 

**If exempt, tick the reason for exemption:**

Self Managed Super Fund  Exempt Public Sector Super Scheme  Retirement Savings Account

Cheque to be made in favour of

**Note:** You can only split contributions to an active super account held in the name of your spouse in a complying super fund. If your spouse does not have an active super account the trustee will not be able to process your request.

Your spouse may have the option of joining REI Super. For details, including a copy of the relevant Product Disclosure Statement, please call the Helpline on 1300 134 433 or website [www.reisuper.com.au](http://www.reisuper.com.au).

\* A transfer to another fund cannot occur without the ABN **and** SPIN or membership/policy number of your spouse's fund. If your rollover fund does not have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance. Your spouse's super fund can help you complete these details.

For a rollover to a registered Self Managed Super Fund, please provide a copy of each of the following:

- the Fund's Trust Deed
- the New Trustee Letter from the ATO, and
- evidence of a bank account in your Fund's name.





## Step 5 – Sign the form (member to complete)

I request that the trustee of REI Super splits the contributions detailed in Steps 4A and/or 4B to the superannuation account of my spouse as detailed in Step 3.

By signing this form I acknowledge that I have read and understood the fact sheet 'Splitting super contributions in REI Super' and I understand that:

I confirm that the person nominated as the receiving spouse in Step 3 is an eligible spouse, as defined in Step 6 below.

There may be a delay in payment if my details have changed

I discharge the trustee from any liability with respect to the amount of my super that is transferred.

Signature

X

Date

/   /

## Step 6 – Receiving spouse declaration (spouse to complete)

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

- am aged less than 55 years; OR
- am aged between 55 and 65 years and I have not permanently retired from the workforce.

I understand that:

- The information contained in this form will be used by the trustee to process this contributions split request. For this purpose, the information may pass between the trustee of REI Super and its administrator and other parties as required, including the trustee of the fund to which the contributions are transferred, and I consent to the handling of my personal information in this way.

Signature

X

Date

/   /

\*A spouse is a person:

- who is legally married to the member;
- with whom the member lives on a genuine domestic basis in a relationship as a couple (including a same-sex partner); or
- with whom the member is in a registered relationship under a law of State or Territory (including a same-sex partner).

**Note:** This section must be completed by the receiving spouse in order for the trustee to process the contributions splitting request.

The trustee of REI Super recommends that you seek advice from a licensed, or appropriately authorised, financial adviser regarding your super before you make any decision in relation to contributions splitting.

**Please return your completed form, together with your proof of identity, to REI Super,  
GPO Box 4303, Melbourne, VIC 3001.**

