



Retirement Benefits Fund Board

GPO Box 446, Hobart TAS 7001

Telephone: 1800 622 631 or 03 6233 3672

Facsimile: 03 6233 3357

CONTRIBUTION SPLITTING APPLICATION FORM

Full Name:

Postal Address:

Suburb State Postcode

Email Address:

Phone Numbers:
(Home) (Business) (Mobile)

Member Number: Date of Birth:/...../.....

Your Splittable Contributions:

The maximum amounts of contributions you can split are detailed below:

RBF TAS-SG ACCOUNT

RBF INVESTMENT ACCOUNT

Employer SG Contributions: \$

Employer Contributions: \$

Member Contributions: \$

Receiving Spouse Details (must be married or de facto):

Title: Surname: Given Names:

Gender:

Postal Address:

Suburb State Postcode

Email Address:

Phone Numbers:
(Home) (Business) (Mobile)

Date of Birth:/...../..... RBF Member No (if applicable):

Tax File Number:

Payment Instruction Details (please tick appropriate box):

Retirement Benefits Fund *(If your spouse/de facto does not have an existing RBF Investment Account one will automatically be opened for them)*

OR

Name of Other Fund.....

Fund ABN:..... Fund SFN:.....
(Australian Business Number) (Superannuation Fund Number)

Fund membership number:.....

Postal address of fund:.....

Suburb:State:.....Postcode:.....

Phone number of fund:.....

Contribution Splitting Details:

1. Financial Year Ended:
2. Amount of contributions split (please indicate percentage or \$ amount):

(Note: If you are self employed and intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give RBF notice of your intention to claim a deduction before you lodge this Contributions Splitting Application form. Please contact RBF for the appropriate form.)

Contribution Type	Maximum Amount you can split	Percentage to be Split	Dollar amount to be Split
RBF TAS-SG Account - Employer Contributions	\$	_____ %	\$ _____.
RBF Investment Account - Employer Contributions	\$	_____ %	\$ _____.
RBF Investment Account - Personal Contributions	\$	_____ %	\$ _____.

3. Member Investment Choice option(s)

Draw Down Order – I would like my contributions split to be drawn from my investment options in the following order:

RBF TAS-SG ACCOUNT

<u>% or \$ Amount</u>	<u>Investment Option Name</u>
..... from
..... from
..... from

RBF INVESTMENT ACCOUNT

<u>% or \$ Amount</u>	<u>Investment Option Name</u>
..... from
..... from
..... from

RBF Member Declaration:

By signing this form, I am making the following statements:

I request that the contributions nominated are split to my spouse/de facto's superannuation account.

I declare that:

- I have not already made a contributions splitting request in respect of my interest in RBF for the previous financial year.
- The information I have supplied on this form is complete and correct.
- I am aware that I may ask RBF for all the information that I need to understand my benefit entitlements in my existing RBF account (including information on the fees, Death & Incapacity cover, investment options and the effect of a transfer) AND I do not require any further information.
- I understand and acknowledge the implications and effects of transferring my benefits from my existing RBF account to my spouse/de facto's fund. In particular, I acknowledge that my final benefit will be reduced by at least the amount transferred.
- I have sought advice from my financial planner or have decided not to seek advice.
- I discharge RBF from all further liability in respect of the benefits paid or transferred

Full Name:

Signature: Date:.....

Receiving Spouse Declaration:

I declare that:

At the date of this application I am the spouse/de facto of the applicant and I am:

- Less than my preservation age, or
- Between my preservation age and 65 years and not retired from the workforce.

If I am not an existing RBF member I request that RBF automatically open a RBF Investment Account in my name on the date of the contribution split.

Full Name (Please Print):.....

Signature: Date:.....
