

step-by-step deposit form

GPO Box 446
Hobart Tas 7001
Phone: 1800 622 631
Fax: 03 6233 3357
Web: www.rbf.com.au



Use this form to make personal or spouse contributions to your RBF account

Personal or spouse contributions to superannuation are called non-concessional contributions. Non-concessional contributions are limited to \$150,000 per person each year. If you are under age 65 you can contribute \$450,000 over a 3 year period.

Contributions to your super will count towards your non-concessional contribution limit unless RBF receives written advice that you intend to claim your contributions as a tax deduction. Generally, eligibility to claim a tax deduction for superannuation contributions is restricted to individuals who receive less than 10% of their assessable income and reportable fringe benefits as an employee eligible for superannuation guarantee contributions. To make tax deductible contributions or to advise RBF of your intention to claim a tax deduction, complete RBF's *Tax Deductible Contributions* form.

STEP 1 Member details

RBF membership number:	<input type="text"/>	Date of birth:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name:	<input type="text"/>				
Postal address:	<input type="text"/>				
Suburb:	<input type="text"/>	State:	<input type="text"/>	Postcode:	<input type="text"/>
Phone numbers:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
	(Home)	(Business)	(Mobile)		
Email address:	<input type="text"/>				

STEP 2 Type of payment

- Personal (non-concessional) Contribution (*complete steps 4, 5 & 6*)
- Contribution made by another person (*contributor to complete step 3, account owner to complete steps 4, 5 & 6*)
- Other RBF payment (*please specify and complete steps 4, 5 & 6 as required*)

STEP 3 Contributor's details (to be completed by the contributor)

Only complete this section where the member *making* the contribution is not the owner of the account *receiving* the contribution.

Contributor's Name:

- This is a spouse contribution for which I may claim a tax deduction and I declare that at the time of this contribution, the receiving spouse and I live together on a permanent basis as a legal or de facto husband and wife.
- I am making this contribution into another person's superannuation account.

The account owner will need to sign the declaration over page to complete this deposit.

Contributor's Signature

Date

STEP 4**Contribution details**

Contribution amount \$ Date:

Method of contribution: In person @ RBF
 By mail
 Direct bank deposit
 Internet bank transfer

For direct bank deposits or internet transfers:

Please quote your member number and name in the transaction description on the bank deposit or internet payment description.

Failure to do so may incur bank administration charges.

Then mail this form or fax it to 03 6233 3357 to ensure funds are allocated correctly to your account.

Alternatively details of your deposit can be emailed to super@rbf.com.au.

If we are not correctly advised of your deposit, your funds can not be allocated to your account.

RBF Business Account, BSB 037-001 Account No: 281958, Westpac Banking Corporation, Hobart Branch

STEP 5**Investment Instructions**

Member Investment Choice Option: \$ %
 Member Investment Choice Option: \$ %

I acknowledge that unless I have already provided investment choice instructions for future contributions or nominate an investment choice now, this contribution will be invested in the default Member Investment Choice option, RBF Actively Managed. I will access RBF's website or contact RBF directly if I require more information about Member Investment Choice.

STEP 6**Declaration (to be completed by the account owner)**

The account owner must complete this section.

You must satisfy one of the following criteria (please tick):

- I am under the age of 65
 I am age 65 or over, but under age 75, and have worked at least 40 hours in a continuous 30 day period in the current financial year.

I have read the form and I am aware I may ask RBF for information about the effect this deposit may have on my benefits or insurance cover, and do not require any further information at this time.

I understand that this contribution must remain in my superannuation account until I retire after reaching my preservation age. It is also subject to certain rules, including contribution limits and can only be accepted if RBF currently hold my Tax File Number.

The details provided by me are accurate, true and complete and I understand this information will only be used in accordance with RBF's privacy policy.

Member's Signature

Date