Lump sum voluntary member contribution by cheque form

UniSuper

Please complete this form if you want to make a lump sum voluntary member contribution by cheque.

Important information

UniSuper cannot accept any non-concessional (after-tax) contributions from any members who have not quoted their Tax File Number (TFN). To find out if UniSuper has your TFN please refer to your most recent *Benefit Statement* or call the UniSuper Helpline on **1800 331 685** between 8.30am and 7.00pm Monday to Thursdays and 8.30am to 6.30pm (Melbourne time) Fridays.

Voluntary member contributions can be made if you are less than 65 regardless of your employment status. If you are aged 65 or older but under 75, voluntary member contributions can only be made if you have been gainfully employed for at least 40 hours in a period of 30 consecutive days in the financial year in which the contribution is made (known as the Work Test). UniSuper cannot accept voluntary member contributions if you are aged 75 and older.

If you would like to make a personal contribution by cheque, please note that cheques must be either:

- personal—from an account in your name (either own or joint),
- a bank cheque, or
- otherwise made at your direction from after-tax money that you are personally entitled to.

Contributions will be invested in your future contributions strategy. If you have not chosen a future contributions strategy, the contribution will be invested in the Balanced option, which is the Fund's default investment option. You can change your future contributions strategy at any time by logging into MemberOnline or by completing an *Investment choice form*, available from our website or by calling the UniSuper Helpline. No fee applies if you change your future contributions strategy.

Under preservation requirements, any contributions you make into super must generally remain in the superannuation system until you permanently retire from the workforce on or after reaching your preservation age.

The government has imposed caps on the total amount of contributions that can be made into super each financial year. If you exceed the caps you may pay a much higher tax rate on any contributions that exceed the caps, or we may be required to refuse contributions in some circumstances. It is your responsibility to monitor the amount of contributions you make to ensure the cap is not exceeded.

Please note this form is not for members who intend to claim a tax deduction for personal contributions. If you wish to claim a tax deduction please complete a *Notice of intent to claim a tax deduction for personal super contributions form*, available on our website, or by calling the UniSuper Helpline on **1800 331 685**.

Further information

For further information on preservation, contribution caps, the Work Test or help to complete this form:

- call the **UniSuper Helpline** on **1800 331 685**
- email **enquiry@unisuper.com.au**
- visit the UniSuper website at **www.unisuper.com.au**

Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. UniSuper collects and manages various types of personal information about you to provide you with UniSuper membership and benefits. To find out more about how UniSuper collects and manages your personal information, please refer to UniSuper's Privacy Policy, which is available from UniSuper's website at **www.unisuper.com.au** or by calling the UniSuper Helpline on **1800 331 685** between 8.30am and 7pm, Monday to Thursday, and 8.30am to 6.30pm (Melbourne time) Fridays.

SECTION 1 — Member details

Please use BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross where required X

UniSuper member number

Title Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐

Other

Surname

Given name

Date of birth *(DDMMYYYY)*

Contact number *(during business hours)*

( )

SECTION 2 — Voluntary member contribution declaration

I declare that:
(Please select one box only)

☐ I am aged less than 65

☐ I am aged 65 or older but under 75 and have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year

form continues

Fund: UniSuper ABN 91 385 943 850
Trustee: UniSuper Limited ABN 54 006 027 121
Level 35, 385 Bourke Street, Melbourne VIC 3000
Administrator: UniSuper Management Pty Ltd ABN 91 006 961 799 AFSL 235907

UNISF00082 0413
Date: April 2013

SECTION 3 — Voluntary member contribution cheque details

I wish to make a lump sum voluntary member contribution by cheque in the amount of:

$, .

Name of drawer

Bank/branch

I confirm that the cheque is:

(a) a personal cheque in my name (or jointly in my name)

(b) a bank cheque

(c) a third-party cheque (i.e. the drawer of the cheque does not contain my name).

Where the cheque is a third-party cheque you must complete the third party declaration below for UniSuper to be able to accept the cheque as a personal contribution.

I declare that the cheque provided with this form is paid in at my direction from after-tax money that I was otherwise personally entitled to.

Signature

X

Date *(DDMMYYYY)*

SECTION 4 — Member declaration and signature

Please read this declaration before you sign and date your form.

- I declare the information I have given on this form is true and correct.
- I acknowledge that the lump sum voluntary member contribution will be invested according to my chosen investment options, or the default option if I haven't made an investment selection, and will be preserved in the superannuation system until a condition of release is met.
- I declare that the cheque provided with this form is either a personal cheque (from an account in my name or jointly in my name), a bank cheque, or is otherwise paid in at my direction from after-tax money that I was otherwise personally entitled to.
- I acknowledge that processing of the contribution may be delayed if this form has not been properly completed or there are any outstanding issues with the cheque or information provided with this form and that the Trustee may at its discretion choose not to accept this contribution and return it to me.
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

X

Date *(DDMMYYYYYY)*

RETURN YOUR COMPLETED FORM TOGETHER WITH YOUR CHEQUE MADE PAYABLE TO UNISUPER LIMITED TO:

UniSuper
Level 35, 385 Bourke Street
Melbourne VIC 3000

Please see 'Important information' overleaf for accepted cheque types.