

Lump sum voluntary member contribution by cheque form



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

IMPORTANT INFORMATION

UniSuper cannot accept any after-tax (non-concessional) contributions from members who haven't quoted their tax file number (TFN). To find out if we have your TFN, refer to your most recent *Benefit Statement* or call us on **1800 331 685**.

Downsizer contributions can be made by members over age 55. For more information on downsizer contributions visit unisuper.com.au.

We can't accept voluntary member contributions if you're aged 75 and older.

If you'd 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 haven't chosen a future contributions strategy, the contribution will be invested in the Balanced option, our default investment option. You can change your future contributions strategy at any time by logging into your online account or by completing an *Investment choice* form, available from our website or by calling us. 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 and still receive concessional tax treatment on those contributions. Any contributions above the caps will be taxed at your marginal tax rate, or we may refuse to accept contributions in some circumstances. It's your responsibility to monitor how contributions made into your UniSuper account—and to any accounts you hold in other super funds—are tracking towards the caps.

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 us on **1800 331 685**.

MORE INFORMATION

For more information on preservation, contributions caps, or for help completing this form:

- call us on **1800 331 685**
- email enquiry@unisuper.com.au
- visit unisuper.com.au

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, please call **1800 331 685**.

SECTION 1 MEMBER DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required.

UniSuper member number

Title

Mr Mrs Ms Dr Professor Other

Surname

Given name

Date of birth (DD/MM/YYYY)

Daytime contact number

Email address



SECTION 2 VOLUNTARY MEMBER CONTRIBUTION DECLARATION

I declare that:

I'm aged less than 75.

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 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'm personally entitled to.

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

SECTION 4 MEMBER DECLARATION AND SIGNATURE

► 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 future contributions strategy—or the default option if I haven't chosen a future contributions strategy—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'm 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

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

Return your completed form, together with your cheque made payable to UniSuper Limited, to:

UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000

Please see 'Important information' on page 1 for accepted cheque types.