

LUMP SUM CONTRIBUTION FORM

Please read before completing

Please complete this form if you wish to make a lump sum contribution to your Capital Guaranteed Super account.

- Use blue or black pen only.
- Please use BLOCK letters.
- Please place an X in boxes where required.

1. ELIGIBILITY

You need to meet eligibility criteria to make a superannuation contribution.

Please tick the relevant box:

- I am under age 65
- I am aged between 65 to 74 and have worked at least 40 hours within 30 consecutive days during the current financial year

Note: Refer to the Capital Guaranteed Super Product Disclosure Statement (PDS) for further details on the type of contributions we can accept if you are aged 65 or over.

2. MEMBER DETAILS

Superannuation member number

Title Given name(s) Date of birth

Surname or family name

Residential address

Suburb State Postcode

Contact number

Email address

3. CONTRIBUTION DETAILS

Personal contribution	\$ <input type="text"/>
Spouse contribution	\$ <input type="text"/>
CGT Exempt contribution	\$ <input type="text"/>
Personal injury contribution	\$ <input type="text"/>

Please send us your completed form by ONE of the following methods:

Australian Military Bank

Email: retire@australianmilitarybank.com.au

Post: PO Box 3528, Tingalpa DC, QLD 4173

4. INVESTMENT DETAILS

Please indicate how you would like your investment to be allocated.

	Option 1	Option 2
	Percentage of Balance (%)	Dollar Amount (\$)
Variable Interest rate*		
Fixed Term Interest rate *		
Total	100%	
	Total must equal 100%	Total must equal 100%

Select your term: (Fixed term only)

- 12 months 24 months 36 months

A minimum of \$180.00 is required to be held in variable interest option

5. PAYMENT METHOD

- Cheque EFT BPay

Cheque

Please make cheques payable to; Capital Guaranteed Super – 'your name'

Electronic Funds Transfer (EFT)

BSB: 642-170

Account number: 100 255 715

Amount: \$

Reference No: Your superannuation member number

BPay

Biller code: 545798

Reference No: You must use your customer reference number allocated to you on your welcome letter

Amount: \$

Important: Ensure your cheque, BPay or EFT payment is sent or made at least 5 days prior to the required due date to ensure your contribution is received by Australian Military Bank by the due date.

6. PERSONAL CONTRIBUTIONS TAX DEDUCTION

Do you intend to claim a tax deduction for personal contributions made in the current or previous financial year?

No – go to Section 7

Yes – please complete the table below (if eligible)

Refer to **enclosed lump sum contribution fact sheet for more information.**

Declaration

- I am lodging this notice before both of the following dates:
 - the day I lodge my income tax return for the current financial year, and
 - the end of the income year after the year in which the contributions were made.
- I intend to claim the personal member contributions stated below as a tax deduction on the basis that I hold a Capital Guaranteed Super account, the account still holds the contributions noted, the account has not started an income stream on these contributions and I have not included these contributions in an earlier notice.

Contribution	Total personal contribution amount only	Tax deduction claim amount only
Current Financial year	\$	\$
Previous Financial year	\$	\$

7. DECLARATION

Authorisation:

- I have read and understood the information provided on the **fact sheet.**
- Where I have completed Section 8 advising of my intention to claim a tax deduction on my personal contributions, I declare this information is correct and complete.

Signature

Date

8. CHECKLIST

- Have you considered the concessional and non-concessional contributions caps in relation to this contribution?
- Have you completed all relevant sections of this form? Have you signed this form where indicated?
- If this form is accompanied by a cheque, have you included the account name, **superannuation member** number and contribution type on the back of the cheque?

SUPERANNUATION LUMP SUM CONTRIBUTION FACT SHEET**WHEN TO USE THIS FORM**

Use this form to make a contribution to an existing Capital Guaranteed Super account.

SUPER CONTRIBUTIONS CAPS

Before making a contribution, you should ensure that contributions made this financial year do not exceed the relevant concessional or non-concessional super contributions caps.

For the latest information on super contributions caps and the contributions that count towards each of the caps, refer to your financial planner or the ATO website at ato.gov.au.

FORMS OF PAYMENT

You can make contributions to your Capital Guaranteed Super account via:

- Cheque
- EFT
- BPAY

Please note: Your contribution will not be applied to your account until a valid form is received.

CLAIMING A TAX DEDUCTION FOR PERSONAL CONTRIBUTIONS

If you wish to claim a tax deduction for personal contributions made in the current financial year, you can provide the information in the personal contributions tax deduction section.

If you intend to claim a tax deduction on your personal contributions, you should check whether you are eligible to claim a tax deduction. For information on the eligibility rules, contact your financial planner or accountant or refer to the ATO website at ato.gov.au.

If you intend to claim a tax deduction but have not advised us on this form, you must complete and submit to us a Notice of Intent to claim a tax deduction on personal superannuation contributions form (ATO form number NAT 71121 available on our website at australianmilitarybank.com.au/retirement). Refer to the instructions on the form **and** required timeframes to lodge this form.

Please retain this information fact sheet for your records – do not return it with your completed form.

PO Box 3528, Tingalpa DC, QLD 4173 | Ph: 1300 13 23 28 | Email: retire@australianmilitarybank.com.au
australianmilitarybank.com.au | Capital Guaranteed Super Account is issued by Australian Military Bank Ltd
ABN 48 087 649 741 | AFSL and Australian credit licence number 237 988.