

Instructions

Please use this contribution advice if you or your spouse are making contributions by cheque to your Superannuation account.

You should not complete this form unless you have received, read and understood the current Bank First Superannuation Product Disclosure Statement (PDS) and Contributions fact sheet.

- Black or blue pen please.
- Please use BLOCK letters.
- Please place an X in boxes where required.

Please forward this contribution advice and the cheque to the address below:

Bank First Superannuation,
PO Box 541, Chatswood NSW 2057

Step 1 - Member details

Account Number

Title

First Name

Last Name

Email address (Mandatory requirement)

Date of Birth

Phone number (mobile)

Step 2 - Member contributions via cheque

To make contributions via cheque, please make cheque payable to:

EQT ATF CUBS SF BF Super Fund

Please make a note of your Member name and Account number on the back of the cheque

Contribution Type

Personal Contributions*:

\$

Spouse Contributions **:

\$

Total Contributions:

\$

* Complete step 3 below to confirm your eligibility to contribute. If you intend to claim a tax deduction for your personal contributions, please complete a Notice of Intention to Claim a Tax Deduction form available from the Bank First website or on request by contacting 1300 654 193. Unless such a claim is made and accepted by us, the contributions will be treated as after tax (non-concessional) contributions.

** Contributions from your spouse can only be made if you are aged 70 or less and, if you have reached age 65, you have worked at least 40 hours in a period of not more than 30 consecutive days in the current financial year. If a spouse contribution is nominated here, by signing this form you declare that you satisfy these requirements. If your spouse is making contributions for you with a view to receiving a tax offset, please check eligibility by going to www.ato.gov.au or seeking appropriate advice. For a contributing spouse to qualify for a spouse contributions tax offset, eligibility criteria must be met. Our acceptance of a contribution for you from your spouse does not mean that the tax offset applies.

Step 3 - Eligibility to contribute - personal contributions

To be able to make voluntary personal contributions, you must meet one of the eligibility criteria under superannuation laws. Contribution limits apply for taxation purposes. If the limits are exceeded, extra tax will apply.

To confirm that you are eligible to contribute, please mark the box below that describes your current circumstances:

I am under the age of 65.

I have reached age 65 but am not yet 75 and I have worked at least 40 hours in a period of not more than 30 consecutive days in the current financial year (the Work Test).

I have reached age 65 but am not yet 75 and are relying on the Work Test Exemption which allows me to make voluntary contributions for 12 months following the end of the financial year in which I last met the Work Test.

Please contact Bank First Superannuation immediately if your circumstances change.

Note: If you are aged 65 or over, and wish to continue making personal contributions into your account each financial year, you will be required to complete a new Superannuation Contribution Eligibility Declaration form before the first contribution is made each year.

Step 4 - Authority

- I declare I have obtained, read and understood the current PDS and fact sheets.
- I declare that the information I have completed is true and correct.

Signature of Member

Date

Signature of Contributor (if a spouse contribution is nominated)

Date