

# Voluntary Contribution Form



Please complete in pen using BLOCK letters. Print X in boxes where applicable.

## Section 1: MEMBER DETAILS

Surname			Salutation	
Given Names			Date of birth	
Street Address				
Suburb		State	Postcode	
Telephone (BH)	(AH)	Mobile		
Email			Membership Number	

If you are aged between 65 and 75 years of age, we can accept your contributions if you meet the required work test. Please tick the box if you are aged 65 to 74 years of age and have worked in paid employment at least 40 hours in a period of not more than 30 consecutive days in this financial year?

YES

NO

If you do not meet this work test or are 75 years of age or over, we cannot accept your voluntary contribution.

Are you currently self-employed and intend claiming a tax deduction under section 290-170(3) of the Income Tax Assessment Act 1997 for all or part of this contribution?

YES

NO

## Section 2: YOUR TAX FILE NUMBER (TFN)

I agree to provide my TFN

YES

My TFN is

NO

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, where your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- Your superannuation fund will be able to accept all types of contributions to your account/s;
- The tax on contributions to your superannuation account/s will not increase;
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing your superannuation benefits; and
- It will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

**We are committed to respecting the privacy of the personal information you give us.**

Our formal Privacy Statement sets out how we do this. If you would like a copy of AMG Universal's Privacy Statement, please let us know. We have published our Privacy Statement on our website at [www.amgsuper.com.au](http://www.amgsuper.com.au)

## Section 3: CONTRIBUTION DETAILS

Amount of contribution

Cheque Number

Please make cheque payable to Trust Company Superannuation Services ATF - AMG Universal Super

Amount of contribution

Date Paid

I made a direct deposit to the fund account held at Bank of Queensland :  
(BSB: 124-001 / Account Number: 11-010139)

1. I confirm that I have read the important information above
2. I understand that the personal information that I have provided on this form will be used for the purposes of administering my account.

Member to sign here

Date

## Section 5: DECLARATION FOR MEMBERS OVER AGE 65 (ONLY COMPLETE IF YOU ARE OVER AGE 65)

As there are restrictions on when members can pay money into superannuation, please complete the following declaration if you are over age 65. Please note, by law, member voluntary contributions cannot be accepted once you reach age 75.

By signing this declaration I confirm that I am between age 65 and 74 and have worked at least 40 hours during a period of not more than 30 consecutive days during this financial year. I give permission for AMG Universal Super to contact my employer to confirm these details. My employer's contact details are as follows:

Employers Name

Employers Phone Number

Member to sign here

Date

### Important Information

#### Non-concessional contributions cap

From 1 July 2007 the amount of non-concessional contributions you can make in a financial year without being subject to additional tax will now be capped, subject to the bring forward rule explained below. The cap for the 2010/2011 financial year is \$150,000.

You will be liable to pay tax at 46.5% on non-concessional contributions in excess of the non-concessional cap. The Australian Taxation Office (ATO) will impose this tax on you, and you must withdraw an amount from your superannuation fund equal to your tax liability once the ATO makes their assessment.

#### Bring forward rule

If you are under age 65 in a particular financial year you will be able to bring forward future entitlements to two years worth of non-concessional contributions. This means, for example, that a person under age 65 would be able to contribute non-concessional contributions totalling \$450,000 in the 2010/2011 financial year without exceeding their non-concessional contribution cap. Though once this limit is reached you could not contribute again until the three-year period has ended.

If you are aged 65 or over, you will not be able to 'bring forward' your entitlements to make non-concessional contributions. Accordingly, if you are aged 65 to 74 you will have a non-concessional contributions cap of \$150,000 for the 2009/2010 financial year (indexed), provided you meet the 'work test' for each year a contribution is made.

If you are aged 75 years or over, you are not eligible to make voluntary contributions to your superannuation account unless the contribution is made within 28 days of turning 75.

Please return this completed form to AMG Universal Super GPO Box 330 Brisbane QLD 4001

Phone: (07) 3210 6733 Fax: (07) 3228 2633 Email: [info@amgsuper.com.au](mailto:info@amgsuper.com.au) Web: [www.amgsuper.com.au](http://www.amgsuper.com.au)