



### 3. Are you able to contribute?

Under superannuation law, you must be eligible to make a contribution to this account. The table below shows the circumstances under which you are eligible to make each type of contribution. **Please tick the circumstances that apply to you.**

Contribution types	Personal contributions (including those made by a self employed individual) <sup>1</sup>	Mandated employer contributions (award and superannuation guarantee contributions)	Non-mandated employer contributions (including directed termination payments)	Eligible spouse contributions <sup>2</sup>
<input type="checkbox"/> You are under age 75	✓	✓	✓	✓
<input type="checkbox"/> You are 75 years of age or over <sup>3</sup>	X	✓	X	X

**Notes:**

- <sup>1</sup> If eligible, you may be able to claim a tax deduction for your personal contributions. You must complete a 'Notice of intent to claim or vary a deduction for personal super contributions (Personal Tax Deduction Notice)' and receive an acknowledgement from us before claiming personal contributions as a tax deduction in your tax return. Please refer to the 'How super is taxed' section of the Additional Information Booklet for further information.
- <sup>2</sup> If a spouse contribution is made, you must confirm the person making the contribution is either legally married to you or living with you on a genuine domestic basis as a couple or in a relationship that is registered under a prescribed State/Territory government relationship register and is not entitled to a tax deduction for the contribution.
- <sup>3</sup> Other than for SG and Award employer contributions or downsizer contributions, the contribution must be received on or before the day that is 28 days after the end of the month in which you turn 75 (ie if your birthday is in February, the contribution must be received by 28 March).

### 4. Contribution/Rollover details

Indicate below the type of contribution you are making.

**Rollover**

Complete the details below for the rollover. You must forward the relevant rollover documentation with the rollover cheque(s) to us (reference to cheque(s) is not applicable to SMSF rollovers) or complete the Transfer Authority Form (which you can obtain by calling the Asgard Contact Centre) if you'd like us to manage the transfer.

Is this an SMSF?

Product/Superannuation Fund name

Expected amount

\$

Is this an SMSF?

Product/Superannuation Fund name

Expected amount

\$

**Deposit details**

Amount \$

Deposit type  Cheque  Direct debit

**The deposit is made up of:**

Employer superannuation guarantee (SG) contribution <sup>^</sup>	Personal deducted contribution <sup>†</sup> <sup>^</sup>	Personal undeducted contribution <sup>†</sup> <sup>#</sup>	Salary sacrifice contribution <sup>^</sup>	Additional employer contribution <sup>^</sup>	Spouse contribution <sup>†</sup> <sup>#</sup>
\$	\$	\$	\$	\$	\$

<sup>†</sup> We're generally unable to accept a one-off member contribution, including:

- > a personal deductible contribution that is not covered by a valid tax deduction notice,
- > a personal undeducted contribution, and
- > a spouse contribution

If you have not supplied us with your TFN.

<sup>#</sup> This type of contribution is counted towards your non-concessional contributions cap.

<sup>^</sup> This type of contribution is counted towards your concessional contributions cap.

**Note:**

- > If you're making a personal deductible contribution and wish to provide a valid Notice of intent to claim a deduction for super contributions to confirm your intention to claim a tax deduction for this contribution, you must complete sections 2, 5 and 8 of this form. You should also ensure you complete all other applicable sections.
- > Legislative changes may place restrictions on contributions by employers. Visit the ATO website at [ato.gov.au](http://ato.gov.au) for more information on ways employers can make contributions and the data and payment standards.
- > The government has set caps on the amount of money you can add to superannuation each year on a concessional and non-concessional tax basis. Contributions above the caps may be liable for additional tax which is determined by the ATO after the end of the financial year. **It is your and your adviser's responsibility to monitor your contribution caps. We will not be responsible for ensuring that you do not exceed your contribution caps.** For more detail, speak with a financial adviser or visit the ATO website.

**i** If you choose to provide your Tax file number, please complete section 6.



## 5. Notice of intent to claim a deduction for super contributions

Complete this section if you are making a personal deducted contribution in section 4 and wish to provide a valid 'Notice of intent to claim a deduction for a super contribution' (Notice) at this time.

If you elect not to attach a Notice you can provide the Notice at a later time, subject to tax law restrictions.

**i** If you withdraw part of your superannuation benefit (as a rollover or cash lump sum), the Trustee will no longer hold all of your personal contributions. After making a withdrawal you can only provide a Notice for the proportion of your personal contributions that remain in the fund.

Please indicate by ticking (✓) if you intend to claim a tax deduction for personal contributions made in the current or previous financial year.

**Yes**, I intend to claim a deduction

➔ Complete the 'Notice of intent to claim or vary a deduction for super contributions' form available through your financial adviser, on AdviserNET or by calling our Contact Centre.

**No**, I do not intend to claim a deduction

➔ Proceed to section 6.

**Note:** Your eligibility can be affected by your age and personal circumstances. Refer to [ato.gov.au](http://ato.gov.au) for eligibility.

## 6. Tax file number

You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at [asgard.com.au/privacy](http://asgard.com.au/privacy) or by calling us.

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## 7. Investment instruction

**Contributions/rollovers to Infinity eWRAP/eWRAP Super will be credited to your Cash Account. To purchase managed investments and/or shares contact your financial adviser.**

## 8. Signature

I confirm that:

- > the details provided by me on this form are true and correct;
- > if a spouse contribution is being made, the person actually making the contribution is either legally married to me or living with me on a genuine domestic basis as a couple or in a relationship with me that is registered under a prescribed State/Territory government relationship register and that person is not entitled to a tax deduction for the contribution.

Signature

\_\_\_\_\_

Date

□□□□□□□□

### Checklist

Have you:

- signed and dated this form;
- attached any supporting documentation(s) where requested ie Direct Debit Request, Notice of intent to claim or vary a deduction for super contributions;
- attached any cheques if you are making a deposit via cheque;
- the cheque is dated and signed — post-dated cheques are not acceptable.



## Definitions of contributions

All contributions are preserved.

**Additional employer contributions** are contributions made by the employer which are more than the minimum superannuation guarantee contributions.

**Employer superannuation guarantee contributions** are the minimum contributions payable by employers. For the latest superannuation guarantee rate, please refer to the [ato.gov.au](http://ato.gov.au). Superannuation contributions paid under an industrial award or agreement are also classified as this type of contribution.

**Personal deducted contributions** (also referred to as member deducted contributions) are contributions made directly by an individual for which they can claim a tax deduction.

**Personal undeducted contributions** (also referred to as member undeducted contributions) are contributions made by an individual which cannot be claimed as a tax deduction. These contributions do not attract contributions tax.

**Salary sacrifice contributions** are contributions made from the employee's pre-tax salary. The employee forgoes part of their salary and their employer pays this amount into the employee's super fund instead.

**Spouse undeducted contributions** are contributions made by a person legally married to the member or living with the member on a genuine domestic basis as a couple or in a relationship that is registered under a prescribed State/Territory government relationship register. These contributions are **not eligible to be claimed as a tax deduction**. Some people may be eligible for a tax offset for this type of contribution.

Trustee: BT Funds Management Limited  
ABN 63 002 916 458 RSE L0001090 AFSL 233724  
Custodian and Administrator: Asgard Capital Management Ltd  
ABN 92 009 279 592 AFSL 240695

Asgard Independence Plan – Division 2 ABN 90 194 410 365  
Customer Relations Team: 1800 998 185  
Correspondence to: Asgard, PO Box 7490,  
Cloisters Square WA 6850

**Asgard**

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