

Super Assured RSA Personal Contribution.



**Defence
Bank**

Please complete this form if you wish to make a personal contribution.
Complete your details and select the box(s) as applicable.
Note: if you wish to make a spouse contribution you will need to complete our paper-based form.

Download, save and send this form to
investments@defencebank.com.au

Applicant to complete this section.

Member details.

RSA holder number. Phone.
Member name. Email.

Deposit details.

Are you claiming a tax deduction for all or part of your personal contributions? Yes. No.

If Yes, an ATO 'Notice of intent to claim or vary a deduction for personal super contributions' form will be required. Refer to the RSA Product Disclosure Statement (PDS) under 'Tax Deductions on Contributions' or your accountant for more information.

I will transfer funds myself.

Please transfer funds from my Defence Bank account number:

Personal contribution amount. \$

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

The amount you wish to invest is. Select the term.
Variable rate. \$ 6 months.
The amount you wish to invest is. 12 months.
Term deposit \$ (minimum \$10,000). 24 months.

Please add to my existing term deposit **at maturity**.

Note: your deposit may be subject to tax, government charges and fees which are payable prior to the investment in your RSA term deposit option.
*If you do not nominate from the options above, the funds will automatically default to your variable account.

Declaration and acknowledgement.

Please indicate the basis upon which you will make the contributions, or have contributions made on your behalf.

I am under 67 years of age.

I am aged over 67 years of age and declare that:

I am aged 67-74 and wish to make a voluntary contribution in the year after I have stopped working.
(I have a total superannuation balance of less than \$300,000 as at 30 June of last financial year.)

I am aged 67-74 and wish to make non-concessional and/or non-mandated employer contributions over and above the Superannuation Guarantee or award/industrial agreement obligations. I declare that I have been gainfully employed for at least 40 hours in a consecutive period not exceeding 30 days in the financial year in which the contributions are being made.

I have read and understood the Defence Bank Super Assured RSA PDS dated 05/10/2021.

Signature.

Date.