

Super Assured RSA Spouse Contribution.



**Defence
Bank**

Please complete this form if you wish to make a spouse contribution.
Complete your details and select the box(s) as applicable.

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.

We will transfer funds.

Please transfer funds from my Defence Bank account number:

Spouse contribution declaration.

If you wish to make a spouse contribution, please have your spouse complete the following spouse contribution declaration.

The spouse contribution declaration must be signed by an eligible spouse of the Defence Bank Super Assured member, who wishes to make a spouse contribution on the applicant's behalf.

I, _____ (full name of contributing spouse) wish to make a contribution of \$

to the Defence Bank Super Assured RSA on the applicant's behalf. I declare that:

I am the spouse of the applicant named on this application and my spouse is also eligible to receive these contributions. See the 'Declaration and acknowledgement' section of this form and the 'Contribution Rules' in the RSA PDS dated 05/10/2021.

Eligible spouse's signature. Date.

All spouse contributions will be treated as non-concessional contributions and are preserved.

Eligibility for tax offset or other tax relief will depend upon the individual circumstances and advice in this regard should be obtained from your financial adviser or accountant.

The Australian Taxation Office (ATO) defines 'spouse' for the purpose of the rebate to mean your legal spouse (except where the person lives separately from you on a permanent basis), or de facto husband or wife (this includes same sex relationships).

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.

RSA holder's signature. Date.