

Defence Bank Super Assured RSA

Personal Contribution Form



Defence Bank

Please complete this form if you already have a Defence Bank Super Assured Retirement Savings Account (RSA) and wish to make an additional contribution/s.

Complete your details and tick the box(s) as applicable (✓)

If you have any questions regarding this form, please call Defence Bank on **1800 979 188**.

Your details

Title	Rank	<input type="checkbox"/> Male <input type="checkbox"/> Female
Last name		
First name		
Middle name(s)		
Date of birth / /		
Residential address		
State Postcode		
Occupation		
Daytime telephone		
Email		
RSA Holder Number		

Deposit amount

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

Refer to the RSA PDS under 'Tax Deductions on Contributions' for more information.

Please transfer funds from my Defence Bank account number _____ and into my RSA _____:

Personal contribution	\$
Spouse contribution*	\$

*The spouse contribution declaration must be signed.

Investment allocation options

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

Variable rate*

The amount you wish to invest is	\$
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Term Deposit

The amount you wish to invest is (minimum \$10,000)	\$
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Select the term:	<input type="checkbox"/> 6 months	<input type="checkbox"/> 12 months	<input type="checkbox"/> 24 months
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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 minate from the options above, the funds will automatically default to your variable account.

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 03 September 2018.

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.

Please tick one of the following:

- Yes, I am under 65 years of age
- I am aged over 65 years of age and declare that:
- I am having mandated Superannuation Guarantee and/or employer contributions made on my behalf under an award or industrial agreement
- I am aged 65-74 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 (spouse contributions can only be made until age 70)

I have read and understood the Defence Bank Super Assured RSA PDS dated 03 September 2018.

RSA Holder Signature
Date / /

Once complete, please return this form to (no stamp required):

Defence Bank Super Assured RSA
Reply Paid 14537
Melbourne VIC 8001