

Voluntary member contribution

Return this completed form to:

mail@legalsuper.com.au
OR
post to: legalsuper
Locked Bag 5081
Parramatta NSW 2124
Phone: 1800 060 312

Please complete this form if you wish to make a voluntary lump sum payment. Before you complete this form you must read the legalsuper *Superannuation Product Disclosure Statement* (PDS) and the *Employer Sponsored Super & Personal Super Additional Information* document, which includes important information about legalsuper. The legalsuper PDS and *Employer Sponsored Super & Personal Super Additional Information* document and all forms that you may require are available free of charge at legalsuper.com.au or by calling **1800 060 312** (8am to 8pm [AEST] Monday to Friday).

If you are aged 67 or over, please answer all of Section 4. Once completed, please return this form by email to: mail@legalsuper.com.au. Please ensure you have also signed Section 6.

Please use **BLOCK LETTERS** and **BLACK INK** when completing this form.

This form will be invalid if unsigned or undated by the applicant (see section 6).

1. My details

legalsuper Membership Number (if known)

Mr
 Mrs
 Ms
 Miss
 Dr
 Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

2. Contribution details

Member voluntary contribution (after income tax)

Voluntary contribution amount

\$

How to make after tax contributions

We've established options for you to make after tax contributions in various ways, so there's a convenient payment method to suit everyone's individual needs.

Payment options

- BPAY
- Electronic Funds Transfer (EFT)
- Monthly Payments - Direct debit
- Real Time Gross Transfer (RTGS)

BPAY

Log in to MemberAccess or call our Client Service Centre on 1800 060 312 to obtain your unique BPAY Reference Code. You also need legalsuper's Biller Code which is 29728. You can make a once off payment or create a recurring payment.

MONTHLY PAYMENTS - DIRECT DEBIT

Set up monthly direct debits from your bank account by completing and returning our direct debit request form to legalsuper. To delay, cancel or change your Direct Debit, you would need to advise us in writing at least three business days before the date we will debit your bank account.

The Direct debit request form is available at legalsuper.com.au

ELECTRONIC FUNDS TRANSFER (EFT)

You must include your membership number in the transaction description.

Make your EFT to:

Bank account name: legalsuper

Bank: Westpac Banking Corporation

BSB: 032021

Account number: 560011

SWIFT code (for overseas transfers): WPACAU2S

Branch address: Corner of Pitt & Bridge Streets, Sydney NSW 2000

Description: Your legalsuper membership number.

REAL TIME GROSS TRANSFER (RTGS)

To arrange a contribution by RTGS you will need to contact your bank and provide them with the same details as an EFT payment. Please remember to include your membership number in the transaction description.

Important note:

If legalsuper is unable to determine the owner of the contribution, we are obliged to remit the contribution to the Australian Securities and Investments Commission (ASIC).

Should you identify that your contribution has not been applied to your account within five business days, please contact legalsuper. However, delays may be experienced during peak periods, e.g. end of financial year. Provided completed documentation is received, contributions will be applied in the financial year of which the contribution was received.

Please note that if you intend to claim a tax deduction for all or part of this voluntary contribution, you also need to complete and submit a notice under s290-170 of the *Income Tax Assessment Act 1997*, and receive an acknowledgement of this notice from the Trustee.

3. Privacy & Authorisation

Privacy

Please note that by sending legalsuper personal information about yourself, you are agreeing to the following:

1. That you have read the legalsuper Privacy Policy and understand how legalsuper intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
2. That legalsuper can use it for the purposes of running your superannuation account.

If you would like a copy of legalsuper's Privacy Policy, please call legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday) or visit legalsuper.com.au

4. Employment Questionnaire (67 to 74 only)

Accepting personal contributions

From 01 July 2022, if you are aged between 67 to 74 (under 75) then you are no longer required to meet the work test rule for personal superannuation contributions and salary sacrificed contributions (within your existing contribution cap limits). The work test rule will only apply for personal deductible contributions for ages between 67 and 74.

5. Investment option selection

Please note your contribution will be allocated as per your existing investment profile.

OR

You may direct this contribution to any investment option(s) by completing the following section. Note any future inflows will be credited to this investment option(s) chosen. Should you wish to modify your investment profile please do so online or by completing the *Superannuation change details* form relevant to your membership type available on the legalsuper website.

You can invest in one or a mix of options. **The percentage can only be up to 2 decimal places and the total should add up to 100%.**

Investment Choice Option	% for each Investment option		
MySuper Balanced ¹ (default option – Employer-sponsored members only)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enhanced Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>
Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balanced Index	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>
Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>
High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overseas Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balanced Socially Responsible	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	100	0	0

¹The MySuper Balanced option is the default option for Employer-sponsored members only. For Employer-sponsored members, any amount that you have not provided any instruction that amount will be invested in the default MySuper Balanced option.

Applications for the Direct Investment option (DIO) can only be made via MemberAccess available at legalsuper.com.au. Investment in the DIO is subject to investment minimums. Please refer to the *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document.

We recommend you seek appropriately qualified professional advice if you need assistance in making an investment choice.

6. Declaration

I declare that:

- I have obtained, read and understood the information contained in the PDS and the *Employer Sponsored Super & Personal Super Additional Information* document;
- The information contained in this form is true and I acknowledge that responsibility for its completeness and accuracy is mine;
- I agree, and have previously agreed, that my superannuation held in legalsuper is governed by the terms and provisions of the legalsuper Trust Deed as in force from time to time;
- I am aware of taxation rules as generally described in the PDS and the *Employer Sponsored Super & Personal Super Additional Information* document that govern my personal contributions made under this application and that I have independently obtained (if I consider necessary) suitably qualified professional advice that the contribution being made complies with the relevant taxation provisions and that by accepting this contribution the Trustee is not responsible (other than as required by legislation) for any personal taxation consequences should the contribution not comply with the taxation rules that apply to personal contributions.

Member's signature

Date (dd/mm/yyyy)