



Please complete in capital letters and in BLACK INK only

This form is to be completed if you wish to make a one-off superannuation contribution.

If you wish to rollover monies into your existing superannuation fund, please complete a "Transfer-In Authority" form (available from Member Services or the FuturePlus Super website – see "Where to send this form/enquiries" for details).

1. Your details

Member No	<input type="text"/>	Date of birth (dd/mm/yyyy)	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Title	<input type="text"/> (e.g. Mr/Mrs/Ms/Miss/Dr)						
Family name	<input type="text"/>						
Given name(s)	<input type="text"/>						
Contact Details (postal address, telephone, email)							
No./Street/PO Box	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		
Phone: Home no. (inc. STD/ISD)	<input type="text"/>			Business no. (inc. STD/ISD)	<input type="text"/>		
Mobile no.	<input type="text"/>			Fax no. (inc. STD/ISD)	<input type="text"/>		
E-mail address	<input type="text"/>						
Residential Address							
<input type="checkbox"/>	Same as Postal Address above						
<input type="checkbox"/>	Different from Postal Address above – you MUST complete below						
No./Street	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		

2. Single contribution - You must attach your cheque made payable to "FuturePlus Super" and forward the completed form and cheque to the Fund.

I wish to make a single payment of: \$	<input type="text"/>	This amount will be credited to your account on the date this form or cheque is received, whichever is the latter.
See Important Notes as limits apply to the amount that can be contributed on a non-concessional basis.		

3. Applicant declaration

I have fully read this form and the information completed is true and correct:		
Signed	<input type="text"/>	Date (dd/mm/yyyy) <input type="text"/> / <input type="text"/> / <input type="text"/>



IMPORTANT NOTES

You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Fund's website.

NON-CONCESSIONAL CONTRIBUTIONS

You may wish to supplement your employer's contributions with personal (after-tax) superannuation contributions, and you have two choices:

- Regular payroll deductions ("*Member Contributions*" form¹),
or
- Single (lump sum) payment

Non-concessional Contributions Cap

Non-concessional contributions to super will be limited to the non-concessional cap amount per financial year if you are 64 years or younger, or 65 years to 74 years and satisfy the work test (that is you are gainfully employed for at least 40 hours during a consecutive 30 day period each year a contribution is made). If you are younger than 65, you can bring forward up to three years worth of these contributions provided that at the end of the third year you have not contributed an amount exceeding three times the non-concessional cap. Please note that the non-concessional cap is six times the concessional contribution cap amount.

If you exceed the non-concessional cap, the contributions in excess of the cap will be taxed at the top marginal rate plus the Medicare Levy.

For the amount of the cap that applies to the current year, please see the Product Disclosure Statement available on the website or contact Member Services.

Fund-capped Contributions

Your fund is limited in the amount it can accept in any one contribution. The limits are:

Age at 1 July	Fund-capped contribution limit
If the member is 65 years of age or older on 1 July of the financial year	the non-concessional contributions cap for that financial year currently
If the member is 64 years of age or less on 1 July of the financial year	three times the non-concessional contributions cap for that financial year

Your fund must return the amount by which the contribution exceeds the limit within 30 days and will not report the returned amount as a contribution for you. However, your fund cannot return all or part of a contribution only for the reason that you would otherwise have an excess contributions tax assessment.

TRANSFERS FROM OTHER SUPERANNUATION FUNDS

The Fund can accept transfers of superannuation benefits from other funds.

Such transfers can be arranged by completing a '*Transfer-in Authority*' form¹.

Where to send this form/enquiries

FuturePlus Super
PO Box N835
Grosvenor Place NSW 1220
website: www.futureplussuper.com.au

Phone: 1300 369 901
(8.30 am – 5.00 pm Mon – Fri)

enquiries: info@futureplussuper.com.au

DO NOT FAX OR EMAIL THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED

HAVE YOU PROVIDED YOUR TAX FILE NUMBER (TFN) TO THE FUND

If you or your employer have not provided your TFN to the Fund by the end of a financial year, then all your concessional contributions will be taxed at the top marginal tax rate, plus Medicare levy, if they exceed \$1,000. For any accounts that begin after 1 July 2007, the \$1,000 threshold does not apply. Furthermore, your Fund will not be able to accept any non-concessional contributions from you if we do not have your TFN.

For this reason it is crucial that you consider providing your TFN to the Fund, either directly or through your employer, as soon as possible (if you haven't already done so). You should also check your Member Benefit Statement to ensure that your TFN is correctly recorded. Further information concerning TFNs can be found in the PDS.

To give us your TFN, complete a "*Notification of Tax File Number*" form¹ and send it to us with this form.

PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in FuturePlus Super while other information is required under Australia's Anti-Money Laundering and Counter-Terrorism Financing laws.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or the website at www.futureplussuper.com.au.

TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take into account your personal objectives, financial situation or needs. Any advice in this document is provided by Chifley Financial Services Limited (ABN 75 053 704 706), as an Australian Financial Services Licensee (AFSL 231148). Chifley Financial Services Limited is an APRA Registrable Superannuation Entity Licensee and the trustee of FuturePlus Super (ABN 76 829 356 693). Chifley Financial Services Limited is co-owned by Energy Industries Superannuation Scheme Pty Limited (ABN 72 077 947 285), Unions NSW, Australian Workers Union (ABN 28 853 022 982 trading as the Australian Workers Union National Office) and the Australian Workers Union (ABN 70 662 384 762 trading as The Australian Workers Union Greater New South Wales Branch).

You should not rely solely on this information and you should consider your own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) or other offer document and seek professional investment advice.

¹Forms are available from Member Services or the FuturePlus Super website – see "*Where to send this form/enquiries*" below for details.

