

Application to make lump sum contributions

About this form

We need you to fill out this form if you wish to pay a lump sum contribution into ANZ Staff Super. This information will be used to identify you and allocate the money to your Member Voluntary Account.

Note that you must have provided your Tax File Number (TFN) to ANZ Staff Super before you can make after-tax contributions to ANZ Staff Super. If your TFN has not been provided, this contribution cannot be accepted by ANZ Staff Super and will be returned to you.

If you are uncertain as to whether or not you have provided your TFN, you can check these details on the website address or by contacting ANZ Staff Super on **1800 000 086**.

If you need help

For assistance call ANZ Staff Super on **1800 000 086**, or go to **anzstaffsuper.com**.

Step 1 – Complete your personal details

Please print in black or blue pen,
in uppercase, one character per box.

A✓

TitleMrMrsMsMissOther

Date of birth

Given names

Surname

Postal address

Suburb

State

Postcode

Daytime Telephone

Mobile

E-mail

Membership number

Membership Section:

Employee Section

Employee Section C

Personal Section

Partner Section

Continued over

Please return your completed form to:
ANZ Staff Super
GPO Box 2139
Melbourne VIC 3001

Step 2 – Payment details

I request the Trustee of ANZ Staff Super to accept a lump sum contribution of

Administration use only
11575 SA008

\$, . as an after-tax contribution¹.

☒ (Select an option)

☐ I wish to make this payment by cheque. Please make the cheque payable to ANZ Staff Super

Cheque number

Only cheques drawn on personal or joint accounts can be accepted – cheques on company accounts cannot be accepted for personal non-concessional (i.e. after-tax) contributions.

☐ I wish to contribute to ANZ Staff Super via BPay. ANZ Staff Super's BPay biller number and your reference number are located in the secure section of ANZ Staff Super's website **anzstaffsuper.com**.

Note:

1. Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made to ANZ Staff Super as a single payment. If your contribution exceeds those limits, the excess will be returned to you.
2. If you are aged 67 to 74, you will need to meet the work test or qualify for the exemption if you intend to claim a tax deduction for this contribution.

Downsizer contributions

To make a "downsizer" contribution, you must do this separately by completing the ATO's *Downsizer contribution into superannuation* form which is available on **anzstaffsuper.com**. For information and eligibility about downsizing contributions, visit **ATO.gov.au**

Step 3 – Sign the form

Your application will not be accepted unless you have signed this declaration. By signing this form I:

- am under age 75 and am eligible to make this contribution
- acknowledge that I have read and understood the information provided in the Product Disclosure Statement on contributions, and agree to be bound by it
- acknowledge I have read the "Protecting members' privacy" statement on this form (see below)
- consent to the collection, use, storage and disclosure of my personal information as described in the "Protecting members' privacy" statement on this form
- accept that I will be bound by the provisions of the trust deed which govern the operation of ANZ Staff Super
- accept that this contribution will remain preserved until my retirement
- understand that this contribution will be returned to me if I have not provided my Tax File Number to ANZ Staff Super
- understand that nothing on this form constitutes financial advice or recommendations.

Signature

Date

/ /

Please return your completed form (Part A) to:
ANZ Staff Super
GPO Box 2139
Melbourne VIC 3001

Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The administrator, Australian Administration Services Pty Limited, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential but may be disclosed by the Trustee or administrator to third parties, such as ANZ Staff Super's actuary, insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Australian Financial Complaints Authority. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' enquiries or complaints.

Members' personal information may be disclosed to related entities of the administrator located overseas as part of the day-to-day provision of administration or ancillary services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super
Mail: GPO Box 2139
Melbourne VIC 3001
Phone: 1800 000 086
Fax: (02) 9287 0320
Email: enquiry@anzstaffsuper.com

The Trustee's Privacy Policy Statement is available on ANZ Staff Super's website **anzstaffsuper.com** or by calling us on **1800 000 086**. You can also access the administrator's privacy policy on our website.