



CAVENDISH

SUPERANNUATION CONTRIBUTION SPLITTING APPLICATION

SECTION A – Applicant details

1. Your details

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) _____

Surname _____

Given names _____

Date of birth / /
 DD MM YYY

Sex ☐ Male ☐ Female

2. Your address

Street no. & name _____

Suburb/town _____ State _____ Postcode _____

3. Your contact details

Daytime tel no. () _____

Email address _____

4. Your fund

Name of fund _____

Fund Australian Business Number (ABN) _____

Fund Superannuation Fund Number (SFN, if applicable) _____

Member Account Number _____

[Please go to the next page and complete all details.](#)



SECTION B – Receiving spouse details

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) _____

Surname _____

Given names _____

Date of birth _____ / _____ / _____
DD MM YYYY

Sex ☐ Male ☐ Female

Street no. & name _____

Suburb/town _____ State _____ Postcode _____

Daytime tel no. () _____

Email address _____

Name of fund _____

Fund Australian Business Number (ABN) _____

Fund Superannuation Fund Number (SFN, if applicable) _____

Superannuation Product Identification Number (SPIN) _____

Member Account Number _____

Please go to the next page and complete all details.



SUPERANNUATION CONTRIBUTION SPLITTING APPLICATION (continued)

SECTION C – Contributions splitting details

9. Splitting details

Financial year ending 30 / 06 / YYY

Taxed contributions to be split* Dollar amount: \$ _____ or percentage: _____ %

*Untaxed contributions made after 5 April 2007 cannot be split

Note: If you intend to claim a deduction for personal superannuation contributions made during the relevant financial year, you must give the trustee notice of your intention to claim a deduction before you lodge a superannuation contributions splitting application.

SECTION D – Applicant request and declaration

I hereby request that you split the contributions detailed in section C to the superannuation account of my spouse as detailed in section B. I declare that the information provided on this form is correct.

Name (please print) _____

Signed _____ Date / /
DD MM YYYY

SECTION E – Receiving spouse declaration

I declare that at the date of this application I am the spouse of the applicant and I am aged:

- ☐ less than my preservation age, OR
☐ between my preservation age and 65 years and have not retired from the work force.

Name (please print) _____

Signed _____ Date / /
DD MM YYYY

SECTION F – Fee Structure

Contribution Splitting \$240

Please return these forms to Cavendish Superannuation, GPO Box 9981, Adelaide SA 5001

OFFICE USE ONLY

Date received / /
DD MM YYYY

Contributions confirmed ☐

S290-170 Notice Complete ☐

Rollover prepared ☐

Deed allows splitting ☐

SMSF Operations Pty Ltd
ABN 30 007 778 341 a Corporate
Authorised Representative of SMSF
Administration Solutions Pty Ltd
ABN 76 097 695 988 AFSL 291195

SUPERANNUATION CONTRIBUTION SPLITTING APPLICATION (continued)



CAVENDISH

APPENDIX – Instructions on completing this form

The financial year is the year in which the superannuation contributions were made to your account. Only contributions made on or after 1 January 2006 can be split to your spouse's superannuation account.

Write down the amount of taxed contributions that you are applying to split to your spouse's superannuation account. Or write down the amount of taxed contributions to be split as a percentage of the total eligible contributions made during the relevant financial year. The amount or percentage that your spouse can receive cannot be more than 85% of the taxed contributions you made or more than the concessional contributions cap for the financial year.

Contact Cavendish if you need more information about the maximum amounts which can be split. Cavendish can also advise you of any rules your Trust Deed may contain regarding limits on amounts or percentages of contributions that can be split to your spouse's superannuation account.

There are a range of **taxed contributions** which can be split. These contributions are made to your superannuation fund, and are taxable to the fund for income tax purposes. They include:

- employer contributions
- personal contributions for which an income tax deduction is to be claimed
- superannuation holding accounts (SHA) special account amounts transferred to your superannuation account by the Tax Office on or after 1 January 2006
- superannuation guarantee entitlements transferred to your superannuation account by the Tax Office on or after 1 January 2006, and
- allocated surplus contribution amounts.

Superannuation co-contributions and personal untaxed contributions made after 5 April 2007 cannot be split to your spouse's superannuation account.

Retirement from the workforce

The following table sets out the preservation age of superannuation benefits, which depends on your date of birth.

Date of birth	Preservation Age
Before 1 July 1960	55
1 July 1960–30 June 1961	56
1 July 1961–30 June 1962	57
1 July 1962–30 June 1963	58
1 July 1963–30 June 1964	59
After 30 June 1964	60

If you have reached your preservation age and are younger than 60, you are considered to be retired from the workforce if:

- your employment arrangement has come to an end, and
- you do not intend to work full-time or part-time again.

If you are 60 or older, you are considered to be retired from the workforce if your employment arrangement has finished since you turned 60.