

Lump Sum Contributions



Use this form to make a lump sum contribution to your Australian Catholic Superannuation Account. Simply complete this form using a dark pen and capital letters or type directly into this form online, print it out and send it to us. Ensure all appropriate check boxes are marked with an (X).

Once the form is complete, remember to sign and date it. Return the form to:

Australian Catholic Superannuation and Retirement Fund
PO Box 656, Burwood NSW 1805

- ✉ PO Box 656, Burwood NSW 1805
- ☎ 1300 658 776
- 🌐 www.catholicsuper.com.au
- 🐦 @AusCathSuper
- ✉ fundoffice@catholicsuper.com.au

i There are limits on how much you can contribute to your super account. It is important you understand these limits by first reading the Product Disclosure Statement and contributions fact sheet which can be found on our website catholicsuper.com.au. If you are still unsure about the limits after reading the Product Disclosure Statement and contributions fact sheet, you can contact us on **1300 658 776**.

i Important
 If you are aged between 67 to 74, limits apply to how much you can contribute to your account. See catholicsuper.com.au for more information.

1 Your lump sum contribution

Any lump sum contribution you make to your Australian Catholic Superannuation account is subject to certain conditions. Please mark (X) in the relevant boxes:

<input type="checkbox"/> I am under age 67	<input type="checkbox"/> I am aged between 67 and 74 and have met the work test or am exempt from the work test
<input type="checkbox"/> I wish to make a non-deductible lump sum contribution	<input type="checkbox"/> I wish to make a non-deductible lump sum contribution
OR	
<input type="checkbox"/> I wish to make a deductible lump sum contribution.	<input type="checkbox"/> I wish to make a deductible lump sum contribution.

i Work test = Aged between 67 and 74 and have worked at least 40 hours over a period of not more than 30 consecutive days during the current financial year.
 Work test exemption = Aged between 67 and 74 with a total superannuation balance below \$300,000 as at the previous financial year and have not used the work test exemption in a previous financial year, will be able to make voluntary contributions for 12 months from the end of the financial year in which they last met the work test.

2 Your current details

Client ID	Account number	Date of birth	Male	Female
1 <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Title	Surname			
<input type="text"/>	<input type="text"/>			
Given names				
<input type="text"/>				
Postal address				
<input type="text"/>				
Suburb	State	Postcode		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Mobile	Home telephone number	Tax File Number		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Email				
<input type="text"/>				

i Important
 We are required and authorised to ask for your TFN. You don't have to provide your TFN but providing it may save you paying additional tax.



Form continues overleaf

! Important

Your bank or personal cheque or Australia Post Money Order should be made payable to Australian Catholic Superannuation and Retirement Fund.

3 Your lump sum contribution amount

I wish to contribute the following amount to my Australian Catholic Superannuation account. I understand that a letter of confirmation will be sent to me on receipt of my contribution.

\$

I have attached a cheque for this amount

I have made this payment via BPAY

There are contribution caps applicable please refer to section 6.

! Important

Before completing this section, we recommend reading the *Your Investment Options Superannuation Fact Sheet* available from catholicsuper.com.au.

4 Choose your investment option

You can choose (x) to invest your lump sum contribution:

According to your last recorded investment option(s)

OR

According to the investment choice specified below.

You can choose to invest in any one or a combination of up to 13 investment options.

Invest my lump sum contribution in the following investment options:

Investment option	
Managed options	
Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Responsible	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %
Capital Stable	<input type="text"/> <input type="text"/> <input type="text"/> %
Build your own options	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash and Term Deposits	<input type="text"/> <input type="text"/> <input type="text"/> %
Credit Income	<input type="text"/> <input type="text"/> <input type="text"/> %
Total	1 0 0 %

i The column must add up to 100% and you must select at least one option.

! Important

The amount you claim as a tax deduction counts towards your concessional contribution cap.

5 Your tax deduction declaration

I hereby give notice to the Australian Catholic Superannuation and Retirement Fund that for the financial year ending 30 June

I intend to claim \$ of a total contribution of \$ as a tax deduction in my income tax return pursuant to Section 290-170(1) of the *Income Tax Assessment Act*.

i If you claim a tax deduction for your lump sum contribution, a 15% contributions tax will be deducted from the amount you are claiming when it is deposited into your Australian Catholic Superannuation account. You are under no obligation to claim a tax deduction.



Form continues overleaf

6 Information on non-concessional contribution cap limits

The following is only applicable to members under 65 years of age. If you are 65-74 bring forward rules do not apply to you.

Total superannuation balance* on 30 June 2017	Maximum non-concessional contributions cap for the first year	Bring-forward period
Less than \$1.4 million	\$300,000	3 years
\$1.4 million to less than \$1.5 million	\$200,000	2 years
\$1.5 million to less than \$1.6 million	\$100,000	No bring-forward period, general non-concessional contributions cap applies.
\$1.6 million	nil	n/a

i If you have triggered the bring-forward period in 2015-16 or 2016-2017 but you have not fully used your bring-forward amount before 1 July 2017, transitional arrangements will apply. This means that the maximum amount of bring-forward available will reflect the reduced annual contributions caps.

* Your total superannuation balance is made up of the balance of all your super and retirement savings accounts.

! Take note

Don't forget to sign and date your form before sending it back to us.

We do not accept digital signatures.

! Important

See the Understanding Unit Pricing document available from catholicsuper.com.au for further details.

7 Authorisation and declaration

I understand that by signing this form my lump sum contribution will be allocated to my Australian Catholic Superannuation account in accordance with my investment choice instructions above.

- I have read the *Superannuation Product Disclosure Statement*.
- I understand that contribution limits apply to my lump sum contribution.
- I have read the contributions fact sheet and understand the contribution limits applicable to me.
- I have informed the Trustee of my intention to claim a deduction for personal superannuation contributions.
- I have not yet lodged my income tax return claiming this deduction.

Print full name (use BLOCK letters)

Signature


Date

PRIVACY STATEMENT: Australian Catholic Superannuation collects and uses personal information in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth) for the management and administration of the Fund as well as to comply with relevant legislation. Personal information may be disclosed to other parties, including persons authorised by the member, the Fund's insurer, government bodies and the trustee of any other fund a superannuation account is transferred to. To access personal information or for a copy of our Privacy Policy, visit catholicsuper.com.au or phone **1300 658 776**.


Contact us

Please sign and date this form and return it to us:


 Australian Catholic Superannuation and Retirement Fund
PO Box 656, Burwood NSW 1805

 (02) 9715 0090

For more information contact our helpful staff:

 1300 658 776

 www.catholicsuper.com.au

 fundoffice@catholicsuper.com.au

 @AskAusCathSuper



This page has been left intentionally blank.