

Super Personal Contribution Form

Complete this form to make personal contributions to a LUCRF Super account.

Step 1 Payment details

Please read our Personal Information Collection Statement at lucrf.com.au/privacy.

LUCRF Super member number (please contact us if you don't know the member number)

Date of birth (dd/mm/yyyy)

Mr Mrs Miss Ms Other (please specify)

Member's first name(s)

Member's last name

Address

Unit/Street number

Street name

Suburb/City/Town

State/Territory Postcode

Contact details

Email address

Mobile phone

Work phone

Home phone

If you're paying on behalf of a member, please provide your name below:

First name(s)

Last name

Signature



Date (dd/mm/yyyy)



138.02

Issued September 2017 by L.U.C.R.F Pty Ltd ABN 18 005 502 090 AFSL 258481 as Trustee for Labour Union Co-operative Retirement Fund (LUCRF Super) ABN 26 382 680 883.

Step 2 Tax file number (TFN) and super search consent

LUCRF Super is authorised under legislation to collect the TFN of the account holder. Where provided it will be kept confidential and used only for lawful purposes (which may change in the future). If we don't have the TFN recorded, tax will be paid at a higher rate on before-tax contributions and we won't be able to accept after-tax contributions.

I am aware I do not have to provide my TFN, but by providing it I understand LUCRF Super will only use it for legal purposes.

I choose to provide my TFN and declare that it is:

Your super search consent and authorisation

I consent to LUCRF Super using my TFN to search for any super held by other super providers or the Australian Taxation Office (ATO). I understand that any super held with the ATO will automatically be transferred into my LUCRF Super account. LUCRF Super will notify me of any accounts held with other super providers before seeking my approval to transfer these funds into my LUCRF Super account.

I understand that my consent will remain in place until I contact LUCRF Super to cancel it. Before combining my super accounts, I understand that I should consider how it might affect my insurance in other funds and if they have any exit fees.

Note: we'll only use your TFN in accordance with your consent. You can cancel your consent by calling **1300 130 780**, or writing to us at mypartner@lucrf.com.au.

Superannuation amounts held with other providers and reported to the ATO as a result of a super search may differ to the amount transferred to your LUCRF Super account as a result of investment returns, exit fees or penalties by the other provider.

Step 3a Contribution type

Please cross [X] the appropriate box:

Personal contribution (non-concessional)

Spouse contribution

If you make a spouse contribution(s) on behalf of a non-working or low-income earning spouse, you could qualify for an 18% tax rebate on spouse contributions. The maximum rebate per financial year is capped at \$540 when a spouse contributes \$3,000 or more. To be eligible for a spouse rebate, your spouse must earn less than \$40,000 for the financial year in which the spouse contribution is made. Other conditions apply. Visit ato.gov.au for more details.

Step 3b Payment method

There are four ways you can make personal contributions into an account. If you're self-employed and wish to claim this payment as a tax deduction, please call us on **1300 130 780**.

Payment methods

1. BPAY®

This is the quickest and easiest way to make an after-tax contribution. Please contact your bank or financial institution to make this payment. There is a maximum limit of \$100,000 per BPAY transaction. BPAY payments may take up to four days' processing time.

Biller code: 484469

Reference (LUCRF Super account number)

If you don't know the account number call us on **1300 130 780**.

® Registered to BPAY Pty Ltd ABN 69 079 137 518



2. Payroll deduction

If your employer allows additional contributions to be deducted from your pay, complete a Request for Payroll Deduction Form (available at lucrf.com.au or by calling us) and hand it to your payroll department.

Continued on next page

Payment methods (continued)

3. Bank transfer

The LUCRF Super member number **must** appear on our bank statement, so it should form part of the transfer description. On the same day as the transfer, please email this completed form to mypartner@lucrf.com.au. This will ensure that funds received will be processed promptly to your account.

Our bank details:

Account Name: LUCRF Pty. Ltd Trust Account **Bank:** Commonwealth Bank **Branch:** Chancery House

BSB: 063-003 **Account number:** 00251714

Payee's name:

Payment amount:

\$

Date of payment:

/ /

Payment reference number:

4. Cheque or money order

Address your personal cheque, bank cheque or money order to 'LUCRF Super' and write the LUCRF Super member number on the back. Send it to us with this completed form.

Please complete the details below:

Cheque

Money order

Payment amount:

\$

Date of cheque/money order:

/ /

Checklist

Before you send this form to us, make sure you have:

- enclosed the payment if paying by cheque or money order
- completed all relevant steps
- signed and dated this form.

If you need any help completing this form, please call us on 1300 130 780 or email mypartner@lucrf.com.au.

Send this form to:

LUCRF Super
PO Box 211
North Melbourne VIC 3051
mypartner@lucrf.com.au

Office use only Receipt details

Amount received

\$

Date received (dd/mm/yyyy)

/ /

Payment type

ID witnessed and copy received if paid in person (please cross [X]): YES

Driver licence Passport Other (please specify)

LUCRF Super Representative name

LUCRF Super Representative signature



X

Date (dd/mm/yyyy)

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