

# Super Downsizer Contribution into Superannuation Form



Complete this form to make a downsizer contribution into a LUCRF Super account.

## Step 1 Personal details

Please read our Personal Information Collection Statement at [lucrf.com.au/privacy](http://lucrf.com.au/privacy).

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

Date of birth (dd/mm/yyyy)

Mr  Mrs  Miss  Ms  Other (please specify)

First name(s)

Last name

### Address

Unit/Street number

Street name

Suburb/City/Town

State/Territory Postcode

### Contact details

Email address

Mobile phone

Work/home phone

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

We're 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](mailto: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.



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### Step 3 Your downsizer contribution

Amount of your contribution: \$

Note: Any amount over \$300,000 will not be accepted as a downsizer contribution.

### Step 4 Payment method

There are three ways you can make a downsizer contribution 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. 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](mailto: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:

##### 3. Cheque or money order

Address your personal cheque, bank cheque or money order to 'LUCRF Super' and write your 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:  /  /

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## Step 5 Your declaration

- I understand that a downsizer contribution is included as a superannuation asset for the Age Pension means test.
- I understand that I am unable to claim a personal superannuation contribution deduction for a downsizer contribution.
- I confirm that I meet all of the eligibility requirements to make a downsizer contribution and declare that the information contained in this form is true and correct.
- I consent to the collection, use and disclosure of my personal information in accordance with the LUCRF Super Personal Information Collection Statement and the Privacy Policy available at [lucrf.com.au/privacy](http://lucrf.com.au/privacy) or by calling 1300 130 780.

### Signature



Date (dd/mm/yyyy)

## Step 6 Personal legal representative's declaration (if applicable)

- This form has been prepared in accordance with information supplied to me by the applicant of this form.
- I have received a declaration from the applicant stating the information provided to me to complete this form is true and correct.
- I am authorised by the applicant to give this information to LUCRF Super.

Name

### Signature



Date (dd/mm/yyyy)

## 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.

## Send this form to:

LUCRF Super  
PO Box 211  
North Melbourne VIC 3051  
[mypartner@lucrf.com.au](mailto:mypartner@lucrf.com.au)

If you need any help completing this form, please call us on **1300 130 780** or email [mypartner@lucrf.com.au](mailto: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 tick ): YES

Driver licence  Passport  Other (please specify)

LUCRF Super Representative name

### LUCRF Super Representative signature



Date (dd/mm/yyyy)