

Make a Rollover Account contribution

This is the form you should use when you make a lump sum contribution into your APSS Rollover Account. You must already have an APSS Rollover Account before you can make an additional contribution using this form.

Your Details

Name: _____

Address: _____

State: _____ Postcode: _____

Daytime phone: _____ Mobile phone: _____

Email: _____ Member number: _____

This number is shown on your Annual Benefit Statement.
For Australia Post Employees it is the same as your APS number.

Contribution amount: \$ _____

Attach personal cheque in your name, bank cheque or money order for this amount made payable to the 'Australia Post Superannuation Scheme'.

After-tax contribution Before-tax contribution*

*Please call SuperPhone **1300 360 373** to discuss the extra paperwork you need to complete to make a Before-tax contribution. If you intend to claim a tax deduction for your personal contribution, ask us for a *Section NAT 71121* form, which you will need to complete and return within the required time frame to claim your tax deduction.

We will not be able to accept any after-tax contribution unless you have quoted your Tax File Number (TFN) to the Trustee. We may also be required to deduct additional tax from any Before-tax contributions (if applicable).

Does the Trustee have your TFN? Yes No

If you need to provide the Trustee with your TFN in order for an after-tax contribution to be made using this form, this can be done by completing the *Provide your Tax File Number* form that you can find in the *Your Member Savings* Product Disclosure Statement (PDS), and also at apss.com.au under *Publications & Forms*, or you can call SuperPhone on **1300 360 373** to provide your TFN over the phone.

Important

Check your super contributions regularly to make sure you don't exceed the applicable annual limits. You can check your total contributions in the APSS for the financial year to date at apss.com.au. Login using your APSS Member number and PIN/Password, then go to *Your Account* and click on *Concessional Contributions* or *Transaction History*.



Make a Rollover Account contribution (continued)

Your investment choice

If you have not previously advised the APSS of your chosen investment option, from 1 July 2017, further contributions to your APSS Rollover Account will be invested in the Balanced option, unless you specify an investment choice. You should refer to *Your Member Savings PDS* and the *Guide to your Member Savings* for more information before completing the section below. You should consider obtaining professional financial product advice before making decisions about your super, including your investment choices.

Important

I instruct the Trustee to change the current investment option allocation for this account as detailed below.
This change should apply to: (select only ONE option)

- my existing account balance; or
- future contributions and Rollovers into my account; or
- BOTH my existing account balance and future contributions/Rollovers into my account.

Cash option _____ %

Conservative option _____ %

Balanced (MySuper) option _____ %

High Growth option _____ %

Total _____ **100%**

Must add up to 100%

Note

The changes are effective from the next available fortnight in line with Australia Post's payroll cycle. To switch all or part of your investment option allocation from the next fortnight, the APSS must receive your completed form at least three complete business days before that fortnight begins. Find out the next switching cut off date by calling *SuperPhone* on **1300 360 373**. It may take a few days from the end of the fortnight for your new instructions to be reflected online at apss.com.au.

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Make a Rollover Account contribution (continued)

Contribution Rules

The APSS can only accept contributions from you into your APSS Rollover Account if:

- your contribution is a personal after-tax contribution, a personal Before-tax contribution (made by claiming a tax deduction for after-tax contributions), or an Employer contribution from Australia Post or an Associated Employer; and
- you are either:
 - under age 67; or
 - between age 67 and 74 (inclusive) and meet the 'work test' or are eligible to make contributions within 12 months from the end of the financial year in which you met the work test (see your Product Disclosure Statement or call **1300 360 373** for details); and
- for after-tax contributions, you have provided your Tax File Number to the APSS.

The APSS cannot accept employer contributions from a third-party employer.

Authorisation to the Trustee of the APSS

I declare that I have read and understood the information contained in the *Your Member Savings PDS* and the *Guide to your Member Savings*, available at apss.com.au on the *Product disclosure* page under the *Publications & Forms* tab.

I declare that I meet the Contribution Rules described above.

I understand that there are legal restrictions to accessing super (Preservation rules) as explained in the *Your Member Savings PDS* and the *Guide to your Member Savings*.

I understand that additional tax may be payable on any after-tax or Before-tax contributions above the prescribed limits. I also understand that any excess Before-tax contributions are counted towards the after-tax contributions limit for the financial year.

I understand the Trustee can only accept personal after-tax contributions into an APSS Rollover Account; or personal Before-tax contributions (made by claiming a tax deduction for after-tax contributions); or, as mentioned in Section 1 of the *Your Member Savings PDS*, Employer contributions from Australia Post or an Associated Employer.

I understand the Trustee will not accept contributions from a third party employer into an APSS Rollover Account.

I authorise the Trustee to implement the investment choice for my Rollover Account as instructed on this form (if applicable).

I understand that my investment choice will be effective from the next available fortnight in line with Australia Post's payroll cycle.

I understand that my investment choice will be the Balanced option if the instructions given on this form are incomplete or ambiguous.

I understand that my investment choice will only apply to my Rollover Account (and not any other APSS accounts I may have, if applicable).

Privacy Collection Statement

I acknowledge and understand:

- that my personal information will be collected by the Trustee (PostSuper Pty Ltd) and stored and dealt with in accordance with the Trustee's Privacy Policy, available at apss.com.au, for the purpose of managing and administering my APSS Account;
- that if my personal information is not collected, then the Trustee may not be able to manage and administer my APSS Account;
- that my personal information may be disclosed to the Trustee's service providers, professional advisers, regulatory bodies and my employer (if applicable) and other parties (as required) in the course of managing and administering my account, as required by law or with my consent;
- that my personal information may be shared with overseas organisations and that I can obtain details of the countries in which such organisations are located by reading the Trustee's Privacy Policy; and
- the Trustee's Privacy Policy contains information about how I can access and seek correction of any personal information held about me by the Trustee, how I can complain about a breach of the Privacy Act 1988 (Cth) and how the Trustee will deal with any such complaint.

I consent to the handling of my information in this manner and acknowledge that I can access my personal information by contacting the APSS.

Signature: _____ Date: _____



When completed, please mail this form and your cheque to **APSS, Locked Bag A5005, Sydney South NSW 1235.**