

Make a lump sum contribution to your super

This form is for Employee Members. It is the form you should use when you want to make an after-tax or before-tax lump sum contribution into an existing APSS Member Savings Account. If you would like to make regular after-tax or before-tax contributions, Australia Post employees need to organise this through ourpost.com.au – contact Australia Post HR Operations on **1300 363 772** for help. If you are employed by an Associated Employer, you need to contact your payroll or HR area.

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.

Important

If the Trustee does not have your Tax File Number (TFN), we cannot accept after-tax contributions for you. We may also be required to deduct additional tax from before-tax contributions made to your account. If you need to provide the Trustee with your TFN in order to make an after-tax contribution using this form, this can be done by completing the *Provide your Tax File Number* form that can be downloaded from the website ([go to Publications & Forms](#) and click on the drop down menu for Forms), or you can call SuperPhone on **1300 360 373** to provide your TFN over the phone.

Contribution rules

By law, you can only make contributions to your Employee Member Savings Account if you are either:

- under age 65; or
- between age 65 and 74 (inclusive) and employed in the paid workforce for at least 40 hours in a period of 30 consecutive days during the current financial year).

You can only make after-tax contributions if your TFN has been provided to the Trustee.

In addition, the APSS will only accept lump sum contributions to your APSS Member Savings account if your contribution is a personal contribution. It cannot be from another employer or third party. If you are an Australia Post employee and want to arrange for regular before-tax salary sacrifice contributions, you need to organise this through ourpost.com.au – contact Australia Post HR Operations on **1300 363 772** for help. If you are employed by an Associated Employer, you need to contact your payroll or HR area.



Make a lump sum contribution to your super (continued)

My contribution details

After-tax contribution amount: \$ _____ OR Before-tax* contribution amount: \$ _____

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

* You can make a Before-tax contribution by claiming a tax deduction for an after-tax contribution. Please call SuperPhone **1300 360 373** to discuss the extra paperwork you need to complete to make a before-tax contribution, including a *Section NAT 71121* form, which you need to complete and return within the required time frame to claim your tax deduction.

Does the Trustee have your TFN? Yes No

Important

Your current chosen allocation for future contributions between the Cash, Conservative, Balanced and High Growth investment options will apply to this contribution. If you have not made an investment choice, then the default Balanced option will apply. You can use the *Change your investment option choice* form to make an investment choice or change your chosen investment option(s).

Authorisation to the Trustee of the APSS

I declare that I meet the Contribution Rules described on page 1.

I understand that this contribution will be allocated to the Cash, Conservative, Balanced and/or High Growth investment option according to my current investment choice allocation for future contributions, or the default Balanced option will apply if I have not made an investment choice.

I understand that additional tax may be payable if my before-tax (concessional) contributions or after-tax (non-concessional) contributions exceed the prescribed limits. I understand that concessional contributions include my employer's notional contributions to fund my defined benefit and any salary sacrifice contributions, as explained in the *Your Defined Benefit & Member Savings* Product Disclosure Statement and the *How super is taxed in 2017-18* fact sheet available from **apss.com.au**. I also understand that any excess concessional contributions are also counted towards my non-concessional contributions cap for the financial year.

I understand that there are legal restrictions to accessing my super (preservation rules) as explained in the *Your Defined Benefit & Member Savings* Product Disclosure Statement, available from **apss.com.au**.

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, this form can simply be sent back by email to **sr@apss.com.au** or by posting it to **APSS, Locked Bag A5005, Sydney South NSW 1235**.