

# Member Voluntary Contribution Form



## Section 1: PERSONAL DETAILS

Surname:  Salutation:

Given Name(s):  Date of Birth:   /   /

Postal Address:

Suburb:  State:  Postcode:

Telephone (BH):  (AH):  Mobile:

Email:  Membership Number:

Do you intend to claim a tax deduction under section 290-170(3) of the Income Tax Assessment Act 1997 for all or part of this contribution?  Yes  No

Please note: if you intend on making a claim for a tax deduction on this contribution you also need to complete a *Notice of intent to claim or vary a deduction for personal super contributions* form from the Australian Tax Office (ATO). See [ato.gov.au](http://ato.gov.au) for more information and to obtain the form. The ATO's *Notice of intent to claim* form should be sent to Freedom of Choice along with this Member Voluntary Contribution Form.

## Section 2: VOLUNTARY CONTRIBUTION ELIGIBILITY

Which of the following options describes you?

I am under 67 years of age (proceed to Section 3).

I am between 67 and 74 years of age (proceed to Section 2.1).

If you are 75 years of age or over, you are unable to make a voluntary contribution to your super.

### Section 2.1: WORK TEST

You can only make a voluntary contribution if you meet the Work Test Criteria or a Work Test Exemption applies.

#### Work Test Criteria

I am between 67 to 74 years of age and have worked in paid employment at least 40 hours in a period of not more than 30 consecutive days in this financial year.

#### Work Test Exemption

- I am between 67 to 74 years of age; and
- do not meet the Work Test Criteria (see above) in the current the financial year;
  - met the Work Test Criteria (see above) last financial year;
  - have a total superannuation balance of less than \$300,000 at the end of the last financial year;
  - have not previously relied upon the Work Test Exemption to make voluntary contributions.

If you are aged between 67 to 74 and do not meet the Work Test Criteria or are ineligible for a Work Test Exemption, you are unable to make a voluntary contribution to your super.

## Section 3: CONTRIBUTION DETAILS

I am making my contribution via:

### EFT

Please transfer funds into the below account.

Bank Name: Westpac  
BSB: 033 009  
Account Number: 103074  
Account Name: Equity Trustee Superannuation Limited ATF Freedom of Choice  
Reference: Member Number *(use your member number as your payment reference)*

Contribution Amount: \$  Date Paid:  /  /

### BPay

Please login to your MySuperSolution account, select 'Cash Transactions' from the left hand menu and click on 'Make Contribution'. You will then be able to obtain your Biller Code and Unique Reference Number.

### Direct Debit

For members who wish to contribute via Direct Debit, please complete the Direct Debit Request form at [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au)

### Cheque

Please make cheque payable to 'Equity Trustees Superannuation Limited ATF Freedom of Choice'

## Section 5: DECLARATION

1. I understand that the personal information that I have provided on this form will be used for the purposes of administering my account.
2. If I am between age 67 and 74, I confirm that I have worked at least 40 hours during a period of not more than 30 consecutive days during this financial year. I give permission for Freedom of Choice to contact my employer to confirm these details.
3. I understand that the Government imposes caps on the amount that can be contributed to superannuation, and that I have read information on the contribution caps at <https://freedomofchoice.com.au/about-super/contributing-to-super/>.

Member's  
Signature:

Date:  /  /

**Please return this completed form to Freedom of Choice PO Box 3528, Tingalpa DC Qld 4173 Australia**

Phone: 1800 806 013 Fax: (07) 3899 7299 Email: [enquiries@freedomofchoice.com.au](mailto:enquiries@freedomofchoice.com.au) Website: [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au)

**We are committed to respecting the privacy of the personal information you give us.**

Our formal Privacy Statement sets out how we do this. If you would like a copy of Freedom of Choice's Privacy Statement, please let us know. We have published our Privacy Statement on our website at [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au)