

Making voluntary contributions to your super account

You can use this form to make an after-tax contribution to the Mercer Super Trust.

Note that you must have provided your Tax File Number (TFN) to the Mercer Super Trust before you can make after-tax contributions. If your TFN has not been provided, this contribution cannot be accepted by the Mercer Super Trust and will be returned to you.

If you are uncertain as to whether or not you have provided your TFN, you can check by signing into your account at mercersuper.com.au or by contacting the Helpline on **1800 931 040**.



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box. **Please note** the form must be signed with a pen and submitted by post. The form cannot be signed digitally.

Want to make this quicker and easier?

Did you know you can also do this in your Member Online account? It's faster, easier and more secure for you www.mercersuper.com.au
Having trouble? Here's some troubleshooting information to help get you logged in
www.mercersuper.com.au/member-online-and-mercero-super-app

As a member of the Mercer Super Trust, you may be able to make voluntary contributions to your super account using BPAY®. BPAY allows you to make a contribution by phone or internet from your phone or internet banking account at a time convenient to you. And it's available 365 days a year!

You can find the BPAY Biller Code and your personal Reference Number by signing into your account at mercersuper.com.au and heading to the Personal Details page. For assistance, please call the Helpline on **1800 931 040**.



If you would prefer to make a contribution via cheque, please use this form. Contributions received by the Mercer Super Trust via cheque may take up to three working days to process following receipt of the cheque and your completed form.

Step 1 – Complete your personal details

Title: Mr Mrs Ms Miss Other Date of birth: / /

Given names

Surname

Postal address

Suburb

State

Postcode

Member number

Plan/product name

Step 2 – Contribution details

A cheque for the amount shown below is attached.

After-tax contributions:* \$

* Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made.

Personal contributions

If you are making a personal contribution to super and would like to claim a tax deduction under section 290 -170(3) of the Income Tax Assessment Act 1997 for all or part of this contribution, please provide us a completed "Notice of intent to claim or vary a deduction for personal super contributions" (NAT 71121) form. This form must be provided within specified time frames or it will be invalid.

More information in respect of claiming a tax deduction and the required form is available from the ATO website – www.ato.gov.au

Step 3 – Eligibility to contribute

To make voluntary contributions you must meet one of the eligibility criteria specified under superannuation laws. To confirm that you are eligible to contribute, please indicate your circumstances below.

(Select one option)

I am under age 67; or

I am between ages 67 and 74 and I have met the Work Test by working at least 40 hours within 30 consecutive days in the current financial year; or

I wish to claim the Work Test Exemption as I am between ages 67 and 74, have met the Work Test in the financial year preceding the financial year in which I made this contribution, had a total superannuation balance of less than \$300,000 (in all my superannuation funds) at the end of the previous financial year and have never claimed a Work Test Exemption previously.

Step 4 – Payment method

Make cheque payable to Mercer Super Trust. Please send the cheque and this form to:

**Mercer Super Trust
GPO Box 4303,
Melbourne, VIC 3001**

Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1800 931 040**.

Our Privacy Policy is available to view at mercersuper.com.au or you can obtain a copy by contacting us on **1800 931 040**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, the fund's administrator, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to our administrator's processing centre in India. Our Privacy Policy lists all other relevant offshore locations.

Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1800 931 040** or write to our Privacy Officer, **GPO Box 4303, Melbourne, VIC 3001**.

Step 5 - Sign the form

By signing this form I confirm that:

- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

Date

/ /

Please return your completed form to the Mercer Super Trust, GPO Box 4303, Melbourne, VIC 3001.

Important Notes: If this form is not completed in full there may be a delay in allocating your contribution to your Mercer Easy Super account in the Mercer Super Trust. The Mercer Super Trust is unable to accept personal contributions by cheque unless accompanied by this completed form. This form should be used to make personal after tax contributions only. If you wish to make Spouse Contributions, call the Helpline on **1800 931 040** and request a 'Making Spouse Contributions' form.