

Step 2 – Declaration of receiving spouse's eligibility

To receive spouse contributions, the receiving spouse must meet one of the eligibility criteria specified under superannuation laws. To confirm that the receiving spouse is eligible to receive these contributions, please indicate their circumstances below.

☒ **(Select one option)**

- ☐ Under age 67; or
- ☐ Between ages 67 and 74 and have met the Work Test by working at least 40 hours within 30 consecutive days in the current financial year; or
- ☐ Wishes to claim the Work Test Exemption as is between ages 67 and 74, have met the Work Test in the financial year preceding the financial year this contribution was made, 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 3 – Details of contributing spouse

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

Given names

Surname

I wish to contribute an amount of \$ which represents a spouse contribution on behalf of my spouse named above, who is a member of Mercy Super.

Please make cheque payable to Mercy Super and attach to this form.

Mercer use only – Reference code 11575

Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. 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 1300 368 891.

Our Privacy Policies are available to view at www.mercysuper.com.au or you can obtain a copy by contacting us on 1300 368 891.

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, 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 Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set 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 1300 368 891 or write to our Privacy Officer, PO Box 8334, Woolloongabba Queensland 4102

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Step 4 – Signature of contributing spouse

I wish to make contributions to Mercy Super for the benefit of my spouse named above (Step 1) who is an existing member and eligible to receive such contributions. By signing this form I understand that:

- I acknowledge that any such contributions to the Plan are for the benefit of my spouse (the nominated spouse) and cannot be repaid to me.
- I confirm that the nominated spouse is my spouse within the meaning of relevant Government Legislation.
- I will advise the Trustee if my nominated spouse ceases to be my spouse within the meaning of the legislation or, if between 67 and 70 ceases to be gainfully employed for at least 40 hours in any 30 consecutive days during the financial year in which the contribution is being made.
- I consent to my information being collected, disclosed and used in the manner set out in this form.
- I confirm that I am not entitled to a tax deduction for these spouse contributions.

Signature

X

Date

/ /

Please return your completed form to Mercy Super, PO Box 8334, Woolloongabba, QLD, 4102.

