Regular voluntary contribution form
Complete this form to start, change or cancel regular voluntary contributions from your after-tax pay

Making regular voluntary contributions
... from your after-tax pay
You can start, change or cancel regular voluntary contributions at any time through regular payroll deductions. Contributions into super are subject to the preservation rules and generally must be preserved in the superannuation system until you permanently retire from the workforce on or after reaching your preservation age.

Your regular voluntary contributions will be invested in the investment options you have chosen for your accumulation component/account. If you have not selected an investment option, they will be invested in the Balanced option, which is the Fund’s default investment option.

... from your before-tax pay
If you wish to make regular voluntary contributions on a before-tax basis (i.e. as salary sacrifice), you will need to arrange this through your employer. You cannot use this form.

Important information
Please read the information section on page 3 before completing and submitting this form.

Further information
If you need further information or help to complete this form:
• email enquiry@unisuper.com.au
• call the UniSuper Helpline on 1800 331 685, or
• visit our website at www.unisuper.com.au

Privacy information
UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. UniSuper collects and manages various types of personal information about you to provide you with UniSuper membership and benefits. To find out more about how UniSuper collects and manages your personal information, please refer to UniSuper’s Privacy Policy, which is available from UniSuper’s website at www.unisuper.com.au or by calling the UniSuper Helpline on 1800 331 685 between 9am and 5pm, (AEST) Monday to Friday.

SECTION 1 — Member details

Please use BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS.
Cross where required X

Title:  Mr  Mrs  Ms  Dr  Professor
Other
Surname
Given names
Date of birth (DD/MM/YYYY)
Contact number (during business hours)
(____) _______ _______ _______

UniSuper Member Number
(If you are unsure of your member number, refer to your most recent Benefit Statement or call the Helpline.)

SECTION 2 — Contribution options

You may choose to start, change or cancel regular after-tax voluntary contributions through payroll deductions.

Which of the following would you like to do?
(Select one box only)
Start regular after-tax voluntary contributions  Go to SECTION 3
Change or cancel existing regular voluntary contribution arrangements  Go to SECTION 4

form continues ➔
SECTION 3 — Start contributions via payroll deductions

You may choose any amount for your regular after-tax voluntary contributions — specified as dollars or as a percentage of your pay.

How much do you want to contribute via payroll deductions from your after-tax pay?

$ __________________________ per pay period

OR __________________________ % of my salary per pay period.

Go to SECTION 5

SECTION 4 — Change or cancel contributions via payroll deductions

Do you wish to change or cancel your current regular payroll deductions?

(Select one box only)

Change ☐ What is the new amount you wish to contribute per pay period?

$ __________________________ per pay period

OR __________________________ % of my salary per pay period.

Go to SECTION 5

Cancel ☐

Go to SECTION 5

SECTION 5 — Declaration

Please read this Declaration before you sign and date your form.

• I declare that the information provided is complete and correct.

• I have received, read and understood the information in my UniSuper membership Product Disclosure Statement and in the booklet, investing for the future, and I understand that:
  – my regular voluntary contributions will be invested according to my chosen investment option
  – investing in an investment option involves some risk and on occasion my account balance may decrease
  – UniSuper allows me to change my investment option once each month. The first switch in each financial year is free and there is a fee for any subsequent switches I make each financial year.

• I understand my regular voluntary contributions must be preserved until I become eligible to receive my superannuation benefit.

• I understand that I will be bound by the provisions of the Trust Deed and Regulations of UniSuper as amended from time to time.

• I consent to my personal information being used in accordance with UniSuper’s Privacy Policy and acknowledge that a copy of the UniSuper Privacy Policy is available from the UniSuper website at www.unisuper.com.au or can be obtained by calling the UniSuper Helpline on 1800 331 685.

Signature

Date (DD/MM/YYYY) __________________________ / __________________________ / __________________________

Return your form to:

Return your completed form to your Payroll Officer at your current place of employment.

If you do not have a Payroll Officer, then you can return your completed form to UniSuper by mail to:

UniSuper
Level 37, 385 Bourke Street
Melbourne VIC 3000
**Important information**

The government has imposed caps on the total amount of contributions that can be made into super each financial year. A higher tax rate will apply to voluntary after-tax contributions that exceed the cap. It is your responsibility to monitor the contributions made into your UniSuper account and any other super accounts you have to ensure that the contributions caps are not exceeded.

The voluntary member contributions cap for 2008/09 is $150,000 (or if you are under age 65, $450,000 averaged over 3 years). Please note that if you have not provided your Tax File Number to the Trustee, voluntary member contributions cannot be accepted.

If you are aged 65 but less than 75 voluntary after-tax contributions can only be made if you have worked in paid employment for at least 40 hours in a period of not more than 30 consecutive days in the financial year in which the contribution is made. This is known as the Work Test. Voluntary after-tax contributions cannot be made if you are aged 75 or older.