

Macquarie Wrap Additional investment form

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496



MACQUARIE

Use this form to make additional investments to your Macquarie Wrap Superannuation account.

PLEASE USE BLACK INK

1 Account details

Account number:

Account name:

2 If you are aged between 65 and 75

If aged 65–75¹

I confirm that I have been gainfully employed² for at least 40 hours in a period of not more than 30 consecutive days during the above financial year prior to making contributions.

Work test exemption

I was gainfully employed² for at least 40 hours in a period of not more than 30 consecutive days in the previous financial year, my total superannuation balance at the end of the previous financial year was less than \$300,000 and I have not previously relied on the work test exemption to make contributions in a prior financial year.

Please note: If you do not meet any of the above eligibility criteria the contributions already received or to be received will be returned to the contributor. Other documentation may be required to facilitate this.

3 Investment type

Please confirm which investment type we are receiving by completing the relevant details in A or B below:

A. Contribution

Contribution method

Cheque – Please make cheques payable either to:

MIML – Super Manager [insert applicant's name]

MIML – Super Manager II [insert applicant's name]

MIML – Super Consolidator [insert applicant's name]

MIML – Super Consolidator II [insert applicant's name]

MIML – Super Accumulator [insert applicant's name]

In specie transfer – please include additional required documents.

Transfer from a (non-SMSF) Macquarie Cash Management Account/Consolidator Cash Account/Wrap Cash Account

Account name:

Cash account number:

Amount: \$

Full closure

¹ Member contributions can be accepted if they are received within 28 days after the end of the month in which you reached age 75, provided you make the above declarations.

² Gainfully employed means employed or self-employed for gain or reward in any business, trade, vocation, calling, occupation or employment.

Investment type (continued)

Contribution details

If you are **aged 65 or more** and completing this section, you must be eligible to make contributions into superannuation. You confirm this by signing the declaration in the terms and conditions.

Personal contribution: \$

Deduction notice (optional): Only complete if you intend to claim a tax deduction for all/part of the above contribution. This will be taken to be a deduction notice in the ATO approved and cannot be revoked or withdrawn. Please speak to your adviser for further information.

For contribution(s) made in the financial year ending: 30 June 20

Amount of personal contribution(s) covered by this Deduction Notice that I intend to claim as a tax deduction: \$

If you do not make a selection we will assume you do not wish to lodge or vary a deduction notice.

Spouse contribution: \$

Other contribution and type³: \$ Type:

! Please note: We can not accept contributions made by you or someone on your behalf (other than your employer) if you have not provided your tax file number.

B. Rollover

Rollover method

- From another Macquarie Superannuation account. Please complete the details below.
- From a Macquarie Investment Manager/Consolidator/Consolidator II/Manager/Manager II/Accumulator SMSF account. Please complete a separate withdrawal form authorising the withdrawal from this account.

Existing account details

Account number: Account name:

Amount to be transferred

- Entire balance (your account will be closed)

If that account holds insurance: Transfer it to a standalone policy (attach the insurance application)
 Cancel my insurance
 There is no insurance on the account

- Partial amount by (select one only):

Transferring: \$ from the above account, or

Leaving: \$ in the above account and transferring the rest.

Specify the assets to be transferred out of or remain in the account (depending on your election) or attach a list:

- Where no list of assets is provided, we will transfer out of the account's cash hub.
- Importantly, you must leave the required minimum balance in the account (refer to the PDS for minimum balances).

Deduction notices (optional and only for contributions made to the above account – not available for SMSF accounts)

You must complete this section if you will make a personal contribution and intend to claim or vary a deduction on the personal contribution. **If you do not complete this section, we will proceed with your request.**

Withdrawing or rolling over benefits from your account will result in the Fund no longer holding the entire amount of contributions already made. This will limit your ability to claim a deduction on these contributions.

This will be taken to be a Deduction Notice in the ATO approved form and cannot be varied once the rollover has been processed. Please speak to your adviser for further information.

For contribution(s) made in the financial year ending: 30 June 20

Amount of personal contributions covered by this Deduction Notice that I intend to claim as a tax deduction: \$

³ Please specify the Other contribution type and attach appropriate documentation and attach the appropriate election form before or at the time the contribution is made. Election forms can't be accepted after the contribution is received.

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Confirmation and signature

I confirm that I have met the eligibility rules to contribute to superannuation (for information on these rules, refer to the *Contributing into superannuation* section of the Technical Information Booklet (available at macquarie.com.au/supertech).

If you have completed the Deduction Notice in section 3A; or if you have not previously lodged a notice with the fund for these contributions in section 3B:

I confirm:

- I am lodging this/these notice/s before both of the following dates:
 - the day that I lodged my income tax return for the year stated for the respective contribution(s), and
 - the end of the income year after the year stated for the respective contribution(s)
- at the time of completing this notice:
 - I intend to claim the personal contributions stated in the Deduction Notice (in section 3) above as a tax deduction
 - the trustee has not begun to pay a pension based in whole or part on these contributions
 - I have not included these contributions in an earlier notice
 - the fund still holds these contributions,
- I understand that I may not be able to vary this notice after the withdrawal/rollover has occurred

Client signature

Date: / /

Full name:

- the information given on this form is correct and complete.

If you have completed the Deduction Notice in section 3B and have already lodged a notice with the fund for these contributions and wish to reduce the amount stated in that notice:

I confirm:

- I intend to claim the personal contributions stated in the Deduction Notice in section 3 above as a tax deduction.
- I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice. I confirm that either:
 - I have not yet lodged my income tax return for the year stated for the contribution and this variation notice is being lodged on or before 30 June of the following financial year, or
 - the Tax office has disallowed my claim for a deduction for the relevant year stated for the respective contribution and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.
- I am lodging this/these notice/s before both of the following dates:
 - the day that I lodged my income tax return for the year stated for the respective contribution(s), and
- the information given on this form is correct and complete.

Please complete and return the form via email to wraolutions@macquarie.com or by post to **Macquarie Wrap, GPO Box 4045, Sydney, NSW 2001.**

If you have any queries about completing this form please contact your adviser or us on **1800 025 063.**

