

Personal Contribution Form

Use this form if you are already a member of Max Super, and you would like to make a personal contribution into your Max Super account.

Please use a **dark pen** and CAPITAL letters (except for your email address) to complete this form. You can mail completed forms to:

Tidswell Financial Services Ltd atf Max Super

Reply Paid 3528 TINGALPA DC QLD 4173

Alternatively, you can either complete the form electronically, or scan the completed form, and email it to maxteam@maxsuper.com.au. Please note that if you use an electronic signature, it must visually match the physical signature we have on file.

Use (X) to mark boxes. Forms are located on our website at maxsuper.com.au/member/forms-docs. If you have any questions, call us on 1300 629 787.

Privacy

The personal information you provide on this form is collected by and held for max Super by the fund administrator, DDH Graham Limited, in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering your account and providing you with services associated with your fund membership.

For further information about how your personal information is handled, please call us on 1300 629 787 or visit sargon.com/privacy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about how you may access and seek correction of your personal information, how you may complain about a breach of your privacy and other important information about how your personal information is collected, used and disclosed.

Step 1: Member Details

Member number

Date of birth

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Title

Last name

Given name(s)

Address

Suburb

State

Postcode

Daytime contact number

Mobile number

M F

Tax file number (if not previously provided)

Please note that, while it is not an offence to not provide your tax file number, we are unable to accept personal contributions from you if you do not provide your tax file number. We are authorised to collect your tax file number and will only use it for the purposes of administering your Max Super account. For more information, see our Privacy Policy at sargon.com/privacy.

Email

Step 2: Contribution type and amount

Please note that there are conditions that apply to each contribution type, including age limits, contribution caps and work test rules, which if breached could render you liable for extra tax. If you are classified as a high income earner, you may also be subject to Division 293 tax. For more information, refer to the Tax section of the PDS, or visit the ATO website at ato.gov.au/Individuals/Super/Growing-your-super/Adding-to-your-super/Personal-super-contributions/ and <https://www.ato.gov.au/Individuals/Super/In-detail/Growing-your-super/Super-contributions---too-much-can-mean-extra-tax/>.

Contribution frequency

Monthly amount*

Once Off

*In order to make recurring monthly contributions, you must select Direct Debit as your Payment Method.

Contribution Type

Please mark **X** in the relevant box below

- Personal after-tax contribution (under 65)** \$, .
By ticking this box, you acknowledge that you are less than age 65.
- Personal after-tax contribution (65 and over with work test)** \$, .
By ticking this box, you acknowledge that you are age 65 or older (but not age 75 or above) and you have met the work test for the financial year in which you are making the contribution (gainfully employed for at least 40 hours in a period of not more than 30 days consecutive days in this financial year).
- Personal after-tax contribution (65+ with work test exemption)** \$, .
By ticking this box, you acknowledge that you are age 65 or older (but not age 75 or above) and you have met the work test exemption for the financial year in which you are making the contribution.

Did you know?

Personal after-tax contributions are treated as non-concessional contributions by default. However, subject to the conditions and caps mentioned above, you may be eligible to claim a tax deduction in relation to your personal after-tax contributions, which makes your personal contribution a concessional contribution. To find out more, refer to the PDS, visit ato.gov.au/Individuals/Super/In-detail/Growing-your-super/Claiming-deductions-for-personal-super-contributions/, or speak to a tax professional.

Step 3: Payment Details

If you are making a one-off contribution, you may do so by either direct debit, electronic funds transfer, or cheque, as outlined in options (A) through (C) below. If you are setting up a recurring contribution, you must complete section (A) below.

A) Direct Debit

This is a request and authority to debit the account named below to pay max Super. I request that you debit the following account of which I am an authorised signatory:

Financial institution	Month from which the debits should start
<input type="text"/>	<input type="text"/>

Address

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Bank account name

BSB no.	Bank account no.
<input type="text"/>	<input type="text"/>

IMPORTANT: If your account is held jointly, please provide both names. This debit will be subject to the terms and conditions of the Direct Debit Service Agreement at Step 6.

IMPORTANT: Only an authorised signatory of the bank account can cancel a direct debit. Please note that you must advise us of the cancellation at least 14 days before the debit is due to be processed.

Signature and declaration of direct debit bank account holder(s)

By signing this declaration, you acknowledge that you:

- understand and agree to the terms and conditions governing debit arrangements between you and max Super as set out in this form and the Direct Debit Service Agreement appended to this form;
- are an authorised signatory on the bank account nominated in Step 3;
- have read and understand the max Super Privacy Policy on sargon.com/privacy.

Signature

Second account signatory (if required)

Date (DD-MM-YYYY)

Date (DD-MM-YYYY)

B) Electronic Funds Transfer (EFT)

Bank account name

W	E	S	T	P	A	C		B	A	N	K	I	N	G		C	O	R	P
---	---	---	---	---	---	---	--	---	---	---	---	---	---	---	--	---	---	---	---

BSB no.

0	3	3
---	---	---

1	5	2
---	---	---

Bank account no.

2	6	4	2	2	5
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IMPORTANT: If using EFT please ensure to use your surname and member number as your payment reference.

C) Cheque

Payable to **Tidswell Financial Services Ltd ATF for Max Super.**

Please write your member number on the back of the cheque and enclose it with this form.

Step 4: Personal Contribution Declaration and Signature

By signing this declaration, you declare that:

- you have read the PDS and have received all the information you require in order to exercise the choices you have made. You have made an informed decision as you have read the PDS to which this Personal Contribution applies. All the details you have provided in this form are true and correct;
- you are eligible to make the contribution that you have selected at Step 2 of this form to Max Super, and if your circumstances change will inform the Trustee as soon as is practicable;
- this contribution will remain preserved until a condition of release is met;
- you consent to your personal information being used for the purpose of making this transaction;
- you have provided your TFN, you declare that you have read the important information about my TFN and consent to providing your TFN for the legal purposes stated; and
- you have read Max Super’s Privacy Policy on sargon.com/privacy.

Signature

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Date (DD-MM-YYYY)

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APPENDIX: Direct Debit Service Agreement

This is your Direct Debit Service Agreement with Tidswell Financial Services Ltd as trustee for max Super. It explains what your obligations are when undertaking a direct debit arrangement with us. It also explains our obligations to you as your direct debit provider. Please keep this agreement for future reference. It forms part of the terms and conditions of your Direct Debit Request (DDR) and should be read in conjunction with your request.

1. Debiting your account

1.1 By signing this Direct debit request form, you have authorised us to arrange for funds to be debited from your account. You should refer to the direct debit request and this agreement for the terms of the arrangement between us and you.

1.2 We will only arrange for funds to be debited from your account as authorised in the direct debit request.

1.3 If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

2. Amendments by us

We may vary any details of this agreement or a direct debit request at any time by giving you at least fourteen (14) days written notice.

3. Amendments by you

You may change* a debit payment, or terminate (cancel) this agreement at any time by providing us with at least 14 days notification by writing to:

max Super,
PO Box 3528
Tingalpa DC QLD 4173

Email: maxteam@maxsuper.com.au

or by telephoning us on 1300 629 787 during business hours; or arranging it through your own financial institution, which is required to act promptly on your instructions.

* Note: in relation to the above reference to 'change', your financial institution may change your debit payment only to the extent of advising us of your new account details.

4. Your obligations

4.1 It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the direct debit request

4.2 If there are insufficient clear funds in your account to meet a debit payment:

- a) you may be charged a fee and/or interest by your financial institution;
- b) you may also incur fees or charges imposed or incurred by us; and
- c) you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

4.3 You should check your account statement to verify that the amounts debited from your account are correct

Step 6: Direct Debit Service Agreement cont'd

5. Disputes

5.1 If you believe there has been an error in debiting your account, you should notify us directly on 1300 629 787 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up directly with your financial institution

6. Accounts

You should check:

- a) your account details which you have provided to us are correct by checking them against a recent account statement; and
- b) with your financial institution before completing the direct debit request if you have any queries about how to complete the direct debit request.

7. Confidentiality

7.1 We will keep any information (including your account details) in your direct debit request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information

7.2 We will only disclose information that we have about you:

- a) to the extent specifically required by law; or
- b) for the purposes of this agreement (including disclosing information in connection with any query or claim).

8. Notice

8.1 If you wish to notify us in writing about anything relating to this agreement, you should write to:

max Super,
PO Box 3528
Tingalpa DC QLD 4173

Email: maxteam@maxsuper.com.au

We may send notices either electronically to your email address or by ordinary post to the address you have given us.

8.2 Any notice will be deemed to have been received on the third banking day after emailing or posting