



## Step 2 – Payment details

I request the Trustee of Catholic Super to accept a lump sum contribution of

\$           as an after-tax contribution\*.

I wish to make this payment by cheque. Please make the cheque payable to Catholic Super

Cheque number

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

Internal  
use only  
11585  
CS1601

## 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 an option)**

I am under age 65.

I am between ages 65 and 74 and I have met the work test by working at least 40 hours in a period of 30 consecutive days in the current financial year.

I wish to claim the work test exemption as I am between ages 65 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 at the end of the previous year and have never claimed a work test exemption previously.

## 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 and marketing material information about the other products and services offered by us and our related bodies corporate. If you do not wish to receive marketing material, please contact us on **1300 655 002**.

Our Privacy Policy is available to view at [csf.com.au/privacy](https://csf.com.au/privacy) or you can obtain a copy by contacting us on **1300 655 002**.

When you become a member, we assume that you consent to this handling of your personal information. 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 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 **1300 655 002** or write to Privacy Officer, Catholic Super, GPO BOX 4303, Melbourne, VIC 3001.



## Step 4 – Sign the form

Your application will not be accepted unless you have signed this declaration. By signing this form I:

- acknowledge that I have read and understood the information provided in the Product Disclosure Statement on Contributions, and agree to be bound by it.
- confirm that I am eligible to make this personal lump sum contribution to Catholic Super.
- accept that I will be bound by the provisions of the trust deed which govern the operation of Catholic Super.
- accept that this contribution will remain preserved until my retirement.
- understand that this contribution will be returned to me if I have not provided my Tax File Number to Catholic Super.
- understand that nothing on this form constitutes financial advice or recommendations.
- understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

□□ / □□ / □□□□

**Please return your completed form to the Fund Administrator, Catholic Super, GPO Box 4303, Melbourne, VIC 3001.**

