

# Bendigo SmartOptions Super™

## Additional Contribution Form



Please use this form if you want to make a one-off personal contribution and/or if your spouse wants to make a contribution on your behalf into your Bendigo SmartOptions Super (the Plan) account **by cheque**. For your convenience, the Plan also offers and encourages the use of an electronic payment method via BPAY®. Please visit the Plan's website [www.sandhursttrustees.com.au](http://www.sandhursttrustees.com.au) or contact our Client Services Team on 1800 033 426 for more information.

Please complete this form in **black** or **blue** ink using **CAPITAL LETTERS** and where provided, mark answer boxes with an **X**.

\* Indicates a **mandatory field**. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

### Step 1 Member personal details

---

Member number (if known)

Title  \*Surname

\*Given name(s)

Telephone number  (work/home) Mobile phone

Email address

### Step 2 Tax file number (Go to Step 3 if you have previously provided)

---

Under the Superannuation Industry (Supervision) Act 1993, Sandhurst is authorised to collect your Tax File Number (TFN), which will only be used for legal purposes and in accordance with Sandhurst's Privacy Policy (available at [www.sandhursttrustees.com.au](http://www.sandhursttrustees.com.au)). You are not obliged to provide your TFN and it is not an offence to not quote your TFN. However, if you do not provide your TFN, Sandhurst will be unable to accept personal or spouse contributions for you.

TFN

### Step 3 Contribution eligibility

---

\* If you do not complete this section, Sandhurst may not be able to accept your contributions.

#### For personal contributions:

I am under 65 years of age.

**OR**

I am aged 65 or over and under 75 years of age. I have been gainfully employed for at least 40 hours over 30 consecutive days during this financial year.

#### For spouse contributions:

I am under 65 years of age

**OR**

I am aged 65 or over and under 70 years of age. I have been gainfully employed for at least 40 hours over 30 consecutive days during this financial year.

® Registered to BPAY Pty Ltd ABN 69 079 137 518.

## Step 4 Contribution details

---

\* Please allocate an amount for the relevant contribution type.

Sandhurst cannot accept personal or spouse contributions unless you have provided a valid TFN.

### Personal contribution and/or spouse contribution

(i) Personal contribution \$

#### Do you want to claim a tax deduction?

No  Yes If yes, please attach a completed *Notice of intent to claim or vary a deduction for personal superannuation contributions form* which is available on our website or by contacting our Client Services Team on 1800 033 426.

(ii) Spouse contribution \$

If your spouse has made a contribution into your account on your behalf, he/she may be eligible to claim a spouse superannuation contributions tax offset. Please refer to the ATO website [www.ato.gov.au](http://www.ato.gov.au) for more details.

**Note:** If you want to contribute a CGT small business contribution or a personal injury payment, please attach the relevant completed election form (*Capital Gains Tax Cap Election form* or *Contribution for Personal Injury Election form* respectively) which is available on our website or by contacting our Client Services Team on 1800 033 426.

Please make cheque(s) payable to “**Bendigo SmartOptions Super – <full member name and/or account number>**”.

## Step 5 Investment instructions (optional)

Your contribution will be invested in accordance with your existing Investment Strategy unless you nominate otherwise.

To nominate specific investment option(s) for this contribution, please provide your one-off investment instructions below. **Please note: your existing investment strategy will remain unchanged.** If you are making a one-off contribution or investing into term deposits, annuity funds or S&P/ASX200 listed securities, we can only accept contributions by cheque.

Before making any investment decisions, please read the relevant PDS for the investment options which are available on the Plan's website at [www.sandhursttrustees.com.au/SmartOptions](http://www.sandhursttrustees.com.au/SmartOptions). Sandhurst also strongly recommends you obtain personal advice from a licensed financial adviser.

### (i) Managed funds

Annuity funds cannot exceed 80% of your total account balance. For all available managed funds and APIR codes, refer to the *Bendigo SmartOptions Investment Guide* which is available on our website.

No.	APIR code	Name of managed fund	\$ or units (please specify) of managed fund	% of managed fund

### (ii) S&P/ASX200 listed securities

The minimum investment amount is \$5,000 per transaction, the value of any single security may not exceed 15% of your total account balance and the total value of securities may not exceed 50% of your total account balance as at the time of purchase. For all available ASX codes, refer to the S&P/ASX200 listed securities form which is available on our website.

ASX code	Number of shares	OR	Investment amount	At market price	OR	At maximum price (\$)*
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

\*The maximum buy price will be valid for 30 days, after which the amount for the purchase of your selected shares will be invested as per your Investment Strategy.

**Please note:** Sandhurst provides purchases for all members of the Plan at a rate of 0.205% (incl. GST) of the gross purchase, subject to minimum brokerage of \$38.44 per transaction. Refer to the 'Fees and other costs' section of the *Bendigo SmartOptions Super Product Disclosure Statement* for more information.

### (iii) Term deposits

The minimum investment amount is \$5,000 and the total value cannot exceed 80% of your total account balance. For the latest terms offered, refer to our website.

**Important note:** For the purposes of this product offer, term deposits are deemed to be "illiquid" due to their fixed term nature and early withdrawal conditions. This means that if you choose to invest in a term deposit, Sandhurst is not required to effect a rollover or transfer request out of this investment within 30 days of receipt of all the relevant information. Please refer to the 'Portability of super benefits' section of the *Bendigo SmartOptions Investment Guide* for more information

Term:	<input type="checkbox"/> 3 months	<input type="checkbox"/> 6 months	<input type="checkbox"/> 12 months	Amount \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Term:	<input type="checkbox"/> 3 months	<input type="checkbox"/> 6 months	<input type="checkbox"/> 12 months	Amount \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Term:	<input type="checkbox"/> 3 months	<input type="checkbox"/> 6 months	<input type="checkbox"/> 12 months	Amount \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Term:	<input type="checkbox"/> 3 months	<input type="checkbox"/> 6 months	<input type="checkbox"/> 12 months	Amount \$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Step 6 Member declaration

- I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at [www.sandhursttrustees.com.au](http://www.sandhursttrustees.com.au) and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.
- I acknowledge that Sandhurst has provided me with access to the PDSs for the investment options I have selected (in Step 6) via the Plan's website and I agree to access them on the Plan's website.
- I understand and accept that if I choose to invest in a term deposit, a period longer than 30 days may be required to rollover or transfer out of this investment (in respect of the whole or part of the requested transfer amount) because of the illiquid nature of the investment.
- I am eligible to make personal contributions to the Plan (if applicable).
- I am eligible to receive spouse contributions (if applicable).

\*Member Signature

\*Date

 /  / 

Please submit your completed form together with any cheques:

- a) By posting them to Bendigo SmartOptions, GPO Box 529, Hobart TAS 7001; **OR**
- b) By visiting any Bendigo Bank branch.

## Step 7 Bendigo Bank branch use only

Payment method (mark answer boxes with an **X**)

Cash

Cheque: Drawer:   
Bank:  BSB:  -

**BSB: 633 - 000      ACCOUNT NUMBER: 104971338**

Branch Name:

Branch No:

Staff Signature:

Staff No:

**Branch Staff: Take two photocopies of this form when completed and issue as follows:**

- **Original – Forward to Bendigo SmartOptions Super, GPO BOX 529, HOBART TAS 7001**
- **Photocopy 1 – Retain in your Branch records**
- **Photocopy 2 – Issue to client as a receipt of their transaction**

<Place your Branch Stamp here>

Special instructions:

### Contact details:

Sandhurst Trustees Limited  
Bendigo SmartOptions  
GPO Box 529  
Hobart Tasmania 7001  
Phone: 1800 033 426  
Fax: 03 6215 5800  
Email: [superannuation@bendigobank.com.au](mailto:superannuation@bendigobank.com.au)  
Website: [www.sandhursttrustees.com.au/SmartOptions](http://www.sandhursttrustees.com.au/SmartOptions)