

CONTRIBUTION ADVICE FORM

The logo for Bell Potter, featuring the company name in a bold, black, sans-serif font. A small graphic element, resembling a stylized 'P' or a checkmark, is positioned above the 'B'.

BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

PLEASE COMPLETE AND RETURN TO:
Bell Potter Securities Limited
GPO Box 4718, Melbourne VIC 3001
Facsimile 03 9256 8787

This is one of the most important forms as it informs us, as administrators, how to tax any contributions that are made for a member. Any errors made in the treatment of your contributions can result in you paying **TOO MUCH TAX**, so please complete this form carefully.

If you have any questions in regards to the tax treatment of different types of contributions, please refer to your financial adviser or tax accountant.

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BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

BELL POTTER

Fund Name

Account Number

Contribution Details: Please see below for an explanation of each category.

Breakdown of contributions made

Member Name	Total Contributed	Employer Concessional Contributions	Member (Non Concessional) Contributions	Member Concessional Contributions	Spouse Contributions	Child Contributions

1. I/We hereby confirm that the above information is correct.
2. I/We declare that the person(s) named above are eligible for the above contributions to be made on their behalf/by themselves.

That is:

- They are under age 65; or
- Aged 65 to 74* and have worked at least 40 hours in any consecutive 30 day period in the financial year for which the contribution is being made; or
- The contributions being made are mandated contributions.

*Note: From 1 July 2007 persons aged 70 to 74, became eligible to make deductible contributions upon meeting the work test (refer above)

Signature of Employer (for employer contributions) / Member's representative (for other contributions)

Date (dd/mm/yyyy)

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Employer Concessional Contributions

- Amounts paid by your employer for their superannuation guarantee obligations (if you are an employee); plus
- Additional amounts paid by your employer on your behalf (commonly called Salary Sacrifice) that are paid from your **pre-tax** salary; plus
- Amounts paid by your employer as part of the benefits they provide (e.g. a company may pay 15% superannuation on behalf of their employees, which is in excess of their statutory obligations); plus
- Most contributions paid for employees that are employed by their own companies.

Member Non-Concessional Contributions

- Amounts paid by your employer from your after-tax salary; and/or
- Personal contributions for which a tax deduction will NOT be claimed (previously referred to as 'Undeducted Contributions').

Member Concessional Contributions

- Amounts paid by self-employed persons i.e. sole traders or persons in partnership. It does NOT include people that operate their own company.

Spouse Contributions

- Amounts contributed on behalf of your spouse. While there is no limit on the amount that can be contributed, the person paying may get a rebate of 18% on their tax for contributions up to \$3,000 provided the spouse's taxable income is less than \$10,800.

Child Contributions

- Amounts contributed on behalf of a child under 18 by anyone.