

bcu Retirement Savings Account (RSA) Application

You should not complete this form unless you have received, read & understood the current bcu RSA Product Disclosure Statement (PDS).

PERSONAL DETAILS

Title Mr Mrs Ms Miss Other _____

First name Middle name Surname

Date of Birth / / Member number

Residential address (mandatory)

Suburb/Town State Postcode

Mailing address (if same as residential write 'as above')

Suburb/Town State Postcode

Preferred daytime contact number Email

DECLARATION

- By applying for the bcu RSA you agree to be bound by the bcu RSA terms and conditions and the Account and Access Facilities Terms and Conditions.
 - A cooling off period applies. Please see the bcu RSA PDS for details.
 - The law imposes conditions on the operation and tax treatment of the RSA. These are summarised in the bcu RSA PDS. You should read the PDS before applying.
 - bcu suggests that you obtain professional advice before applying for a RSA to ensure that it is appropriate for you.
- I agree to bcu making the RSA statements available to me electronically online via Acurity Online. In addition I agree to bcu making RSA product disclosures and other RSA related correspondence available to me electronically via other secure means. You will receive notice of any electronic communication via email to your nominated email address advising how to access the information referred to in the communication. By electing to receive electronic communication, you may no longer receive paper documentation relating to your RSA. You must ensure that you notify bcu of any changes to your email address.

Signature Date / /

TAX FILE NUMBER

Please read the important information about Providing your tax file number (TFN) in the bcu RSA PDS.

Tax file number

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I wish to claim a Tax File Number exemption for pension type

DECLARATION OF DEDUCTIBILITY FOR CONCESSIONAL CONTRIBUTION

For completion by self-employed or substantially self-employed members on making a contribution to their account. *

RSA holder

First name

Middle name

Surname

RSA number

I hereby declare my intention to claim a tax deduction on all or part of the amount contributed as follows*:

Amount of contribution

Amount to be claimed as a tax deduction

\$

\$

SPOUSE CONTRIBUTION

I (Name of taxpayer/contributing spouse)

First name

Middle name

Surname

declare that my spouse is

First name

Middle name

Surname

I declare that at the time of making this eligible spouse contribution of \$ that we live together on a Bona fide domestic basis.

All details listed above are true and correct

Signature

Date

CONTRIBUTIONS FOR MEMBERS 65 YEARS AND OVER

- Ages 65 to under 75 - for any personal contributions other than compulsory employer contributions, you must have been gainfully employed for at least 40 hours during any 30 consecutive day period in the financial year.
- Age 75 or over - compulsory employer contributions only

bcu use only:

Member number

bcu RSA number

Identification verified

I confirm that:

PandR has been updated and RSA task completed;

Name of authorised bcu employee

Signature of authorised bcu employee

* If you are ineligible to claim a tax reduction, (e.g. employed), or do not intend to claim a tax deduction (in whole or in part) show NIL.