



# Re-contribution form

Client name

 -  - 

Client reference number (eg 0012345-D9-01)

## STEP 3: WITHDRAWAL OPTIONS

- Withdraw from cash holding account \$
- Sell investments based on standing sell instructions.
- Sell investments based on proportional percentage of portfolio (managed funds only).
- Sell investments based on the instructions below.

### Managed funds

Investment name	Product no.	Value \$	Full sell
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
		<b>Total</b>	\$ <input type="text"/>

### Listed security sales

- Unless otherwise instructed, share trades will be placed at market prices.
- Share trade instructions received up to 2 pm on any business day will be actioned that day. Instructions received after 2 pm may be actioned the following day.
- Limit trades may be cancelled at any time as per CHESS guidelines.

ASX code	Company name	Value \$	Number of shares	Price limit per share*	Full sell
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
		<b>Total</b>		\$ <input type="text"/>	

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## STEP 4: INVESTMENT PURCHASE

### Managed fund purchases

Your cash account cannot be nominated as an investment to purchase.

Investment name	Product no.	Value \$
<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"/>
<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"/>
<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"/>
<b>Total</b>		\$ <input type="text"/>

Refer to the fund's product disclosure statement for further information.

### Listed security purchases

Note:

1. Unless otherwise instructed, share trades will be placed at market prices.
2. Share trade instructions received up to 2 pm on any business day will be actioned that day. Instructions received after 2 pm may be actioned the following day.
3. Limit trades may be cancelled at any time as per CHES guidelines.

*The following portfolio restrictions will apply to members of Summit Superannuation and Pension Plans. Members can invest in direct securities of the S&P/ASX 300, hybrid securities attached to the S&P/ASX 300, plus all listed property trusts, listed investment companies and exchange traded funds (ETFs). Please refer to the latest Investment Menu for further details on restrictions.*

ASX code	Investment name	Value \$	Number of shares	Price limit per share
<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"/>	\$ <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"/>	<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"/>	\$ <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"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<b>Total</b>		\$ <input type="text"/>		

Summit's default broker for executing trades is Core Equity Services (Core Trading), formerly Ausiex. Alternatively, you can have your trades executed by any broker on the Summit panel of brokers, if your shares are held in custody. If your shares are held under the names of individuals, you can only use the default broker.

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## STEP 5: PERSONAL CONTRIBUTIONS – TAX DEDUCTION

Have you made a contribution to this account in the same financial year as this withdrawal?

No If you are eligible to claim a tax deduction and you have made a contribution in the previous financial year, please contact Summit Client Service on 1800 622 772.

Yes Please complete **Notice A** if you are **not eligible** to claim a tax deduction, or if you are eligible but elect not to claim a tax deduction.

Please complete **Notice B** if you are **eligible** and will be claiming a tax deduction.

If you were under 18 years of age at the end of the financial year in which the contributions were made and wish to claim a tax deduction for your contributions, you must have derived income from business or employment activities in the financial year in which the contribution was made.

Please note, if this section is not completed your assets will still be sold down. They will not be paid out to you or rolled over until we receive a valid notice of your intention to claim a tax deduction. If we do not receive this notice, your personal contributions will be treated as non-concessional, which means you cannot claim a deduction.

If you are not sure whether you are eligible to claim a deduction, how much you can claim, or if you can claim a deduction for both the current and previous financial years, please contact your financial adviser.

### Notice A

Please complete this notice if you are not eligible to claim a tax deduction or if you are eligible but elect not to claim a tax deduction.

This notice is in relation to contribution(s) made in the current financial year.

I,  (print full name) advise that I am a member of the above superannuation fund.

I am satisfied that I am not an 'eligible person' for the purposes of Subdivision AB of Division 3 Part III of the Income Tax Assessment Act, or I am an eligible person but I am not electing to claim a tax deduction for contributions made during the current tax year.

### Notice B

Please complete this notice if you are eligible and elect to claim a tax deduction. To determine the maximum amount of your contributions that you are allowed to claim as a tax deduction, please contact your financial adviser or contact Summit Client Service on 1800 622 772.

#### Notice of intent to claim a tax deduction under section 290–170 of the Income Tax Assessment Act 1997

This notice is in relation to contribution(s) made during the current financial year.

I,  (print full name) advise that I am a member of the above superannuation fund,

and I have contributed \$  to the fund in the financial year ending 30 June (add a box to place in the year).

I intend to claim \$  (insert 'maximum' if you wish to claim the maximum allowable tax deduction) of my total contributions in the current tax year as a personal tax deduction and have not previously notified you of my intention to claim this deduction.

I acknowledge that the balance (if any) of my own contributions will not be subject to contributions tax.

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## STEP 6: YOUR DIRECT CREDIT AND DEBIT AUTHORISATION

### Customer ID requirements

To ensure we can process your request to withdraw (cash out) your superannuation benefit from this plan, you must complete this step and provide (if you have not previously done so) a certified copy of one or more identifying documents as explained in the Customer identification information.

You also need to complete this step if you wish to roll over/transfer your funds to a self-managed superannuation fund.

Surname (please print)

Given name(s)

Date of birth

### Residential address (PO box is not acceptable)

Street number and name

Town/Suburb

State

Postcode

Country

Australia

I have attached certified copies of my identification documents.

Client signature

Date

I/We

Given name(s)

Surname

authorise Summit to credit and debit the account described above through the direct credit and debit system.

Account holder signature

Date

Account holder signature (if joint account)

Date

If joint account, all signatures are required.

Note: Direct crediting and debiting is not available on the full range of accounts or may not be offered by some banks/financial institutions. If in doubt, please refer to your bank/financial institution.

The financial institution may in its absolute discretion charge a fee for this service.

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## DIRECT DEBIT REQUEST SERVICE AGREEMENT

The following outlines our and your responsibilities to ensure the smooth and secure operation of our direct debit agreement.

### Our responsibilities

- We will debit your nominated account within 1-2 working days after the withdrawal has been processed.
- We will only deduct the amount nominated from the chosen account.
- We will not disclose the bank details to anyone else, unless the account holder has agreed in writing that we can, or unless the law requires or allows us to do this.

### Your responsibilities

- Before providing the account details, please check with the bank or financial institution that direct debit deductions are allowed on the account chosen.
- Please ensure there is enough money in the account to cover deductions when due. The bank or financial institution may charge a fee if a payment cannot be met.

### Can we help?

- If you have any queries about your direct debit agreement, please contact Summit Client Service on 1800 622 772 or your financial adviser.
- We undertake to respond to queries concerning disputed transactions within five business days of notification.

## STEP 7: DECLARATION

I/We acknowledge and agree that neither NMMT Limited, NM Superannuation Pty Ltd, nor any other member of the Global AXA Group, guarantee the performance of the investments that have been chosen, and do not express any opinion as to the appropriateness of any particular investment in the circumstances of any particular member.

I/We acknowledge that where I/we have invested in a illiquid investment option, any withdrawal or transfer which required the sale of all or part of this investment may be processed in a period longer than 30 days.

I/We confirm that I/we relied on my/our own investigations and the advice of my/our financial adviser in choosing the investments. I/We have also been provided with current product disclosure statements and any supplementary information on the underlying investment recommendation and a written recommendation from my/our financial adviser. I/We therefore ask that Summit action these investment instructions.

Client one signature

Date

Client two signature

Date

### Financial adviser details

Adviser name

 -   - 

Adviser number