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# Family law split application

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**This form can be used to apply for a superannuation payment following a separation or divorce.**

Please be aware that the Trustee may need to follow up and seek further information or documentation.

If you have any questions about how to fill in this form, please call us on 1300 769 619. For information about how we use and handle your information, please refer to our privacy policy statement, which can be accessed at [cfs.com.au/cfsedge](https://cfs.com.au/cfsedge).

Prior to submitting this form, please ensure you have filled out all the necessary sections and signed and dated the declaration. All fields marked with an asterisk (\*) are mandatory for the completion of this request.

Please return the completed form and supporting documents to us via:

- Document Library: this can be uploaded via our online portal, or
  - Post: CFS Edge, Locked Bag 20130, Melbourne VIC 3001, or
  - Email: [cfsedge@cfs.com.au](mailto:cfsedge@cfs.com.au)
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## Section 1: Your personal details

\*Given name(s)

\*Surname

\*Mobile number

\*Email address

Address

## Section 2: Details of member whose superannuation is being split

\*Full name

\*CFS Edge account number

\*CFS Edge account name

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## Section 3: Payment instructions

Please fill in the payment details for the non-member spouse in the relevant section below.

### 1 Transfer benefit to my existing or new CFS Edge account

CFS Edge account name

CFS Edge account number

**Note:** For new accounts, your adviser will work with you to set up the account online. If you have multiple CFS Edge accounts, we may contact you to confirm which account to transfer to.

### 2 Rollover the benefit to my nominated super fund

Tick this box to rollover your benefit to another fund and provide your details below:

Complying super fund ABN

\*Unique Super Identifier

\*Rollover institution fund name

\*Membership number

Tick this box to rollover your benefit to a Self-Managed Super Fund (SMSF) and provide the details of the SMSF<sup>1</sup> below:

\*SMSF name

\*SMSF ABN

\*Electronic Service Address (ESA)

SMSF Membership number

**Note:** Any changes to the bank account details must be initialled.

\*Branch number (BSB)

\*Account number

\*Name of bank account

**Note:** The bank account name must be in the name of the SMSF trustee.

### 3 Lump sum payment

**Note:** Any changes to the bank account details must be initialled.

\*Branch number (BSB)

\*Account number

\*Name of bank account

Select one of the below to confirm you are eligible for a lump sum payment:

I have attained 65.

I am aged 60 to 64 and have ceased a gainful employment arrangement since turning age 60.

I am under 65 years of age and have reached preservation age. I have permanently retired and never intend to be in a gainful employment for 10 or more hours per week.

I am withdrawing unrestricted non-preserved amounts only.

<sup>1</sup> SuperStream must be used to transfer your super benefits to an SMSF. A redemption request cannot be processed until your SMSF details are verified with the ATO. This means that your SMSF will need an Australian Business Number (ABN), Electronic Service Address (ESA) alias, and an SMSF bank account. Ensure before submitting your request that all SMSF details are up to date with the ATO.

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## Section 4: Tax file number

**You're not obliged to disclose your Tax File Number (TFN), but there may be tax consequences including additional tax on family law split payment if it has not been provided. Refer to the CFS Edge Other Important Information brochure for information on the implications of not providing your TFN.**

Tax File Number (if you have not previously provided it)

We are authorised under the *Superannuation Industry (Supervision) Act* (Cth) to collect your TFN for this application. We may also use your TFN to administer other superannuation accounts or investment accounts you hold with us in the future. Where we use your TFN in this way, we will only use it for legal purposes, such as to calculate tax on your benefits, provide information to the Commissioner of Taxation or search for your other super accounts.

## Section 5: Declaration and signature

I declare that:

- I authorise the withdrawal to be paid as instructed on this form;
- if the withdrawal relates to a rollover, I am aware that fees and charges may apply, and I have all the required information about the effect this rollover may have on my benefits;
- I have access to the current PDS including all statements and information that are incorporated by reference and I have read or do not require such information;
- all details in this form are true and correct;
- where my other fund is an SMSF, I confirm that I am a member; and
- I consent to my information being used in accordance with the CFS privacy policy which can be accessed online at [cfs.com.au/cfsedge](https://cfs.com.au/cfsedge).

\*Applicant signature

\*Name

\*Date

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Avanteos Investments Limited ABN 20 096 259 979, AFSL 245531 (AIL) is the trustee of the 'Avanteos Superannuation Trust' ABN 38 876 896 681 and issuer of CFS Edge Super and Pension. Colonial First State Investments Limited ABN 98 002 348 352, AFSL 232468 (CFSIL) is the Investor Directed Portfolio Service operator, administrator and custodian of 'Avanteos Wrap Account Service' which include CFS Edge Investments. This document may include general advice but does not take into account your individual objectives, financial situation or needs. The Target Market Determinations (TMD) for our financial products can be found at [cfs.com.au/cfsedge](https://cfs.com.au/cfsedge) and include a description of who a financial product is appropriate for. You should read the relevant Product Disclosure Statement (PDS), Investor Directed Portfolio Service Guide (IDPS Guide) and Financial Services Guide (FSG) carefully, assess whether the information is appropriate for you, and consider talking to a financial adviser before making an investment decision. The PDS, IDPS Guide and FSG are available online at [cfs.com.au/cfsedge](https://cfs.com.au/cfsedge) or by calling us on 1300 769 619. 30888/FS8053/0525

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## Section 6: Documents to provide

This section provides a comprehensive list of all documents to provide with your application.

All personal/identity documents and legal documents will need to be certified, and the certified copies attached to this request. Refer to the instructions below for how to certify documents.

### Personal/Identity Documents

Certified copy of one of the following identification documents for the person completing this application:

- Current Australian driver's licence
- Current passport (Australian passports can have expired in the last 2 years)
- Current Proof of Age card

OR

Certified copy of one of the following:

- Birth certificate or birth extract
- Citizenship certificate issued by the Australian Government
- Pension card issued in your name by the Department of Human Services that entitles you to a financial benefit

AND one of the following:

- Department of Human Services that shows a provided to you (issued within the last 12 months)
- ATO notice of assessment (issued within the last 12 months)
- Local council rates notice (issued within the last three months)
- Electricity or gas notice (issued within the last three months)

Please call us on 1300 769 619 if you are unable to provide the identification documentation listed above, and we can assist you with what can be provided based on your circumstances.

### Legal Documents

Certified copy of a final court order, consent order or superannuation agreement.

## Instructions for certification

### Who can certify documents?

In Australia, the following people can certify your documents:

- Architect, chiropractor, dentist, legal practitioner, medical practitioner, midwife, nurse, occupational therapist, optometrist, patent attorney, pharmacist, physiotherapist, psychologist, trademarks attorney, veterinary surgeon, Justice of the Peace, police officer, magistrate or judge, notary public.
- Your financial adviser.
- Your accountant (provided they hold a current membership to a professional accounting body).
- An officer of a bank, building society, credit union or finance company (provided they have five or more years of continuous service).
- Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955* (Cth)).

### What should your certified document/s look like?

After the certifier is satisfied the copy is a true copy, they will:

- write or stamp 'True copy of the original document' on every page,
- sign and date the document,
- write their name and qualification,
- apply a registration number (if applicable to their certifying authority, e.g. Justice of the Peace, reg #123456, CPA #123456),
- and/or company/employer name, and
- apply a stamp (if applicable to their certifying authority).