



First Home Saver Account Closure and Superannuation Contribution

For any enquiries contact us on **1300 654 998** Mon to Fri 9am-5pm (Melbourne time).
Mail to Post Origination Administration, ME Bank, First Home Saver Account, Reply Paid 1345, Melbourne, Victoria 8060.
Fax to (03) 9708 4635
Visit mebank.com.au

Complete this form if one of the following options applies to you:

Please tick the option that applies to you:

- I wish to contribute the balance of my First Home Saver Account (FHSA) to super (voluntary contribution);
- I wish to contribute a percentage of my FHSA to super (voluntary contribution) and have also completed the FHSA Closure form;
- I'm no longer eligible to hold an FHSA (compulsory contribution to super).

Please note – you cannot use this form to contribute to your spouse's super fund as a result of a Family Law arrangement.

How to Use this form

Prior to applying to close your account please take note of the following:

- Once the balance of your FHSA is transferred to a super fund, we will close your FHSA. Once the account is closed, you cannot open another FHSA.
- Super fund contributions cannot generally be reversed and the money must remain in the super system until you retire or meet another condition of release.
- A contribution from your FHSA to your super fund does not make you eligible for the super co-contribution.
- If you contribute the balance of your FHSA to your super fund, the contribution will be taken into account when deciding whether you have exceeded the super contribution cap.

To apply to close your FHSA, please follow the steps below:

- Step 1** – Please ensure you are a current member of the super fund you nominate, and it is a complying super fund which accepts contributions from an FHSA;
- Step 2** - Check that all applicants have signed the form; and
- Step 3** - Return this form to us by mail or fax.

Section 1 – Customer details

Title (Mr/Mrs/Miss/Ms/Other)	Surname	Given name(s)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	Gender (Please tick)	Male Female
<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="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Residential address	<input type="text"/>	
	State	Postcode
Postal address (write AS ABOVE if same as residential address)	<input type="text"/>	
	State	Postcode
Home phone	Work phone	Mobile
(<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"/>

Section 2 – First Home Saver Account details

Account name (as it appears on your FHSA statement)
<input type="text"/>
Account number
<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"/>

Section 3 – Tax File Number details

Tax File Number (TFN)
<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"/>

Under the *First Home Saver Accounts Act 2008*, we are authorised to collect your TFN and other information relating to your First Home Saver Account. Although you are not obliged to provide your TFN, we can not contribute the balance of your First Home Saver Account to superannuation without it. Under the *Superannuation Industry (Supervision Act) 1993* your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

Section 4 – Superannuation fund and account details for contribution

Name of super fund

Address of super fund

State

Postcode

Australian Business Number (ABN)

Super fund account details

Your account number

Your client account number (if any)

Superannuation Product Identification Number (SPIN)

Voluntary or compulsory contribution (place an 'X' in one of the following boxes)

V – voluntary contribution to super - you have decided to contribute all or a percentage of your First Home Saver Account balance to super

S – compulsory contribution to super - you have become ineligible to hold a First Home Saver Account and you are required to contribute the balance to super

Section 5 – Declaration

I,
(print full name)

authorise **ME Bank** to contribute all or a percentage of my First Home Saver Account balance to my super fund as instructed on this form and to close my First Home Saver Account. I have read and understood the important information and instructions including:

- how the super contribution counts towards my contribution cap
- that the contribution from my First Home Saver Account will not entitle me to the super co-contribution
- checking that my super fund can accept the contributions
- that once the balance of my First Home Saver Account is contributed to super and the account is closed, I will not be able to open another First Home Saver Account
- how a contribution to super cannot generally be reversed and the money must remain in the super system until I meet a condition of release
- that I may be liable to pay fees for the:
 - closure of my First Home Saver Account
 - entry or deposit of the contribution

Signature

Date