

# Apply to fix contribution errors



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All our forms and publications are available at [spiritsuper.com.au/forms](https://spiritsuper.com.au/forms) or call us on 1800 005 166, and we'll send you a copy.



If you've made an administrative error when paying contributions, you can apply to have this corrected.

## What's an administrative error?

An administrative error may include:

- a clerical, administrative or computer error
- a contribution paid to the wrong employee
- if an employee receives a super guarantee (SG) contribution that they aren't entitled to
- if an employee is overpaid entitlements.

Applications to correct administration errors must be able to demonstrate that an error has occurred.

**!** According to super laws, super contributions are preserved until a condition of release has been met.

We can only reclassify or refund contributions if:

- we're satisfied the payment was genuinely made in error and
- we still hold the contribution.

## What isn't an administrative error?

If a member or employer changes their mind about a contribution, this isn't considered an administrative error.

For example, if a member realises they've exceeded their contributions cap, they can't apply to have their contributions reclassified to avoid paying extra tax. Likewise, if an employer is owed money by an employee, they can't apply for a contribution refund to cover that debt.

We may also decline an application to refund or adjust an administrative error if:

- the contribution was paid to someone who's no longer a member of Spirit Super
- the contribution was paid to Spirit Super instead of another fund (the member can request a rollover to their chosen fund)
- the contribution was paid to another super fund before the member rolled over to us
- the refund will cause complex tax implications for affected members.

This is general information only and doesn't take into account your objectives, financial situation or needs. Before making a decision about Spirit Super, you should consider if this information is right for you and read the *Product disclosure statement*, *Target market determination* and *Financial services guide*. These are available at [spiritsuper.com.au/pds](https://spiritsuper.com.au/pds) or by calling 1800 005 166. | Issuer is Motor Trades Association of Australia Superannuation Fund Pty Ltd (ABN 14 008 650 628, AFSL 238718), the trustee of Spirit Super (ABN 74 559 365 913). Any advice is provided by Quadrant First Pty Ltd (ABN 78 102 167 877, AFSL 284443) (Spirit Super Advice), which is wholly owned by the trustee. A copy of the *Financial services guide* for Spirit Super Advice is available at [spiritsuper.com.au/financial-services-guide](https://spiritsuper.com.au/financial-services-guide) or by calling us on 1800 005 166.

## How to apply to fix an administration error

To apply to have an administration error fixed, complete these two steps.

1. Complete our *Application to fix contributions errors* form.
2. Let the impacted employee know of the error and your application for a refund or reclassification<sup>1</sup>. You should let your employee know that their Spirit Super insurance may be affected, and there may be tax implications. It's your responsibility to advise them to seek professional advice.

<sup>1</sup>Your employee must sign this form if you're requesting a refund of \$2,000 or more.

Make sure you provide enough details about the error when completing the form. We may ask for more information or evidence to support your application.

## What happens after I submit an application?

If your application to reclassify contributions is approved, we'll let you know when the contribution(s) have been adjusted.

If your application for a refund is approved, the final amount may be adjusted to consider any negative investment earnings or out-of-pocket expenses we incurred. If you paid the contribution(s) in the current financial year through a clearing house, we'll refund back through the clearing house. Otherwise, we'll pay to the nominated bank details you provide on the form.

We retain the right to recover our costs if additional investigation or complicated calculations are required.

You'll be notified if your application is declined.



### More information

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