

Declaration of Gainful Employment – ‘Work Test’ ClearView Retirement Plan 2018/19 Financial Year

Use this form if you are aged 65 or over, wish to make personal contributions^{1,2} and need to notify us that you have met the work test for the 2018/19 financial year.

In order for ClearView Life Nominees Pty Ltd, the Trustee of the ClearView Retirement Plan, to accept your personal contributions to your super account for the 2018/19 financial year you must declare that you meet the criteria below.

If you are unsure whether you meet the criteria you should contact your Financial Adviser or contact our Service Centre on **132 977**.

Fields marked with an asterisk (*) must be completed in order for us to action your request.

A. Member details

*Account type

- My ClearView WealthFoundations Super account, or
 My ClearView Superannuation and Roll-overs account

*Please apply this declaration to these accounts / (e.g. CSUP / 100000)

/
 /
 /

*Title

Mr Mrs Ms Miss Dr Other

*Gender

Male Female

*Date of birth

*Given name(s)

*Surname

B. Criteria for acceptance of personal contributions

* Age of Member ³	Acceptance of personal contributions and ‘work test’ requirements
Aged 65 and over but under age 75	Yes , we may accept personal contributions ^{1,2} provided that, at the time of making the contribution, you have been gainfully employed on at least a part-time basis ⁴ during the financial year, and the contributions are received within 28 days of the end of the month in which you turned age 75.
Aged 75 and over	No , we cannot accept these personal contributions ¹ .

*Do you satisfy the above criteria of acceptance?

- Yes** Please complete the member declaration below with the relevant information and return this form to us as soon as possible so that we may process the contribution we have received and/or so we can accept future personal contributions this financial year.
- No** You are unable to make a personal contribution to your superannuation account. If we have received any personal contributions during the 2018/19 financial year and you are over the age of 65, we will need to return any contributions that are dependent on you meeting the ‘work test’.

1 ‘Personal contributions’ are contributions by, or on behalf of the member to the fund but do not include employer contributions.

2 ‘Personal contributions’ for those aged over 70 do not include spouse contributions as these cannot be accepted.

3 Age of member at the time the contribution is made.

4 ‘Gainfully employed on at least a part-time basis’ means that you were employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment for at least 40 hours over 30 consecutive days during the 2018/19 financial year.

