

Declaration of Gainful Employment – ‘Work Test’ ClearView Retirement Plan 2020/21 Financial Year

Use this form if you are aged 67 or over, wish to make personal contributions¹ and need to notify us that you have met the ‘work test’ for the 2020/21 financial year.

In order for ClearView Life Nominees Pty Ltd, the Trustee of the ClearView Retirement Plan, to accept your member/personal contributions to your super account for the 2020/21 financial year you must declare that you meet the criteria below.

If you are unsure whether you meet the criteria you should contact your 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

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

/
 /
 /

*Given name(s)

*Surname

*Date of birth

B. Criteria for acceptance of personal contributions

Age of Member	Acceptance of personal contributions and ‘work test’ requirements
Aged 67 and over but under age 75 ²	<p>We may accept personal contributions¹ provided that, at the time of making the contribution:</p> <p>1. you have been gainfully employed on at least a part-time basis³ during the 2020/21 financial year;</p> <p>OR</p> <p>2. you were not gainfully employed on at least a part-time basis³ in the 2020/21 financial year, but:</p> <p>a) you were gainfully employed on at least a part-time basis³ during the previous 2019/20 financial year;</p> <p>b) your total super balance was less than \$300,000 at the end of the 2019/20 financial year; and</p> <p>c) there have been no previous contributions accepted by any super fund or retirement savings account which relied on the conditions set out above.</p>

If you are aged 75 and over, we cannot accept personal contributions, except where:

- the contribution is received within 28 days of the end of the month in which you turned age 75, or
- the personal contribution is a downsizer contribution (the ‘work test’ is not required to be satisfied for a downsizer contribution).

1. ‘Personal contributions’ are contributions by, or on behalf of, the member to the fund and do not include employer contributions. For those aged over 75, spouse contributions cannot be accepted.
2. Age of member at the time the contribution is made.
3. ‘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.

***C. Member declarations and signature**

To ClearView Life Nominees Pty Limited, Trustee of the ClearView Retirement Plan

- I declare that I have been gainfully employed for at least 40 hours over 30 consecutive days during the 2020/21 financial year. If requested, I agree to provide to the Trustee written evidence to demonstrate that I have been gainfully employed for at least 40 hours over 30 consecutive days during the 2020/21 financial year.
- I declare that I was gainfully employed for at least 40 hours over 30 consecutive days during the 2019/20 financial year, and my total superannuation balance as at 30 June 2020 was less than \$300,000 and I have not relied on this exemption to make any previous contributions. If requested, I agree to provide to the Trustee written evidence to demonstrate that I have been gainfully employed for at least 40 hours over 30 consecutive days during the 2019/20 financial year.

Member signature

Date

D	D	M	M	Y	Y	Y	Y
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Member full name (print clearly in block letters)

We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy, please visit clearview.com.au.

Sending your form

Please send the form to us via email or mail.

Mailing address:
ClearView Wealth
Reply Paid 4232
Sydney NSW 2001

Email address:
client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.