

‘Declaration of Gainful Employment – Work Test’ ClearView Retirement Plan 2017/18 financial year

For completion by members who have attained the age of 65 and wish to make a personal superannuation contribution in the 2017/18 financial year.

In order for ClearView Life Nominees Pty Ltd, the Trustee of the ClearView Retirement Plan to accept your member superannuation contributions for the 2017/18 financial year you must declare that you meet the criteria below.

Criteria met	Age of Member	Acceptance of superannuation contributions and ‘work test’ requirements
<input type="checkbox"/>	Aged 65 and over but under age 75	YES - Fund may accept Member Contributions ^{1,3} provided that, at the time of making the contribution, you have been gainfully employed on at least a part-time basis ² during the financial year and the contributions are received on or before the 28th day after the end of the month in which you turned age 75.
<input type="checkbox"/>	Aged 75 and over	NO - Member Contributions ¹ cannot be accepted by the fund.

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

2 ‘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 2017/18 financial year.

3 ‘Member Contributions’ for those aged over 70 does not include spouse contributions as these cannot be accepted.

Do you satisfy the above criteria?

Yes 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 accept future member contributions this year.

No You are unable to make a personal superannuation contribution to your superannuation account.

MEMBER DECLARATION: 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 2017/18 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 2017/18 financial year.

Signature Date

Member details

Account number Date of birth

Surname Given Name(s)
(please print) (please print)

Residential address

Home number Work Mobile