

ClearView **WealthFoundations**

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

Use this form if you are 65 or over, wish to make personal contributions and need to notify us that you have met the work test for the 2017/18 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 2017/18 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.

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)
 /
 /

*Title

Mr Mrs Ms Miss Dr Other

*Gender

Male Female

*Date of birth

*Given name(s)

*Surname

B. Criteria for work test

* 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 personal 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 - Personal contributions ¹ cannot be accepted by the fund.

1 'Personal 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 'Personal 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 personal contributions this year.
- No** You are unable to make a personal superannuation contribution to your superannuation account.

