

Superannuation contribution eligibility declaration

Instructions

Please complete this form if you are 65 or over, employed and would like to make contributions to your superannuation. Once you have reached age 65 you will be required to complete a new Superannuation Contribution Eligibility Declaration form before the first contribution is made in any financial year.

- Black or blue pen please.
- Please use BLOCK letters.
- Please place an X in boxes where required.

Please send us your completed form to the address below:

Bank First Super
PO Box 541, Chatswood NSW 2057

Step 1 – Member details

Account number

Title

First name

Last name

Email address (mandatory requirement)

Date of birth

Phone number (mobile)

Step 2 – Declaration

Please tick the box that applies to you and sign below

- I am aged between 65 and 74 years and have worked at least 40 hours within a period of not more than 30 consecutive (Work Test) days and am entitled to make contributions to the fund.
- I have reached age 65 but am not yet 75 and am relying on the Work Test Exemption which allows me to make voluntary contributions for 12 months following the end of the financial year in which I last met the Work Test.

Step 3 – Authority

- I declare that the information provided above is true and correct

Signature

Date

Things you need to consider

Depending on your age, contributions can be made by you or on your behalf.

If you are aged 65 to less than 70: To be eligible to make your own personal contributions, receive spouse contributions and for your employer to make nonmandated contributions (voluntary contributions including salary sacrifice) to your superannuation account, you generally must have been gainfully employed for at least 40 hours within a period no more than 30 consecutive days during the financial year in which the contributions are made (known as the Work Test). From 1 July 2019 you may be eligible to apply the Work Test Exemption, which allows you to make your own personal contributions for 12 months following the end of the financial year in which you last met the Work Test. To be eligible, you must have a Total Superannuation Balance of less than \$300,000 at 30 June of the previous financial year and not have applied the Work Test Exemption previously. Mandated employer contributions can be made to your superannuation account at any time.

If you are aged 70 to less than 75: To be eligible to make your own personal contributions and for your employer to make non-mandated contributions (i.e. voluntary contributions including salary sacrifice) to your superannuation account, you must have been gainfully employed for at least 40 hours within a period of no more than 30 consecutive days during the financial year in which the contributions are made. Mandated employer contributions can be made to your superannuation account at any time. Please note that you are ineligible to receive spouse contributions. Please also note that contributions must be received within 28 days of the end of the month in which you reach age 75.

Should you wish to continue making contributions into your account each financial year, you will be required to complete a new Superannuation Contribution Eligibility Declaration form before the first contribution is made each year.