

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.

Please send us your completed form by **ONE** of the following methods:

Email: finplan@bankfirst.com.au

Post: Bank First Superannuation,

Fax: 03 9654 2187

GPO Box 4559, Melbourne VIC 3001

Please note: if you fax or email the form, there is no need to send us the original.

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 if it 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 days and am entitled to make contributions to the fund.

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 non-mandated contributions (voluntary contributions including salary sacrifice) to your superannuation account, you 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. 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.