

Macquarie Superannuation Notification of Eligibility for Superannuation Contributions



Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281

PLEASE USE BLACK INK. PRINT IN CAPITALS. MARK BOXES WITH AN (X) WHERE APPLICABLE.

1. Personal details

Name

Account number

Compulsory: For the financial year 1 July 20 to 30 June 20

2. Eligibility to Contribute

Please complete the declaration most appropriate to your circumstances.

If you are aged between 65 and 75*:

- I have been gainfully employed** for at least 40 hours in a period of not more than 30 consecutive days during the above financial year.
- Employer contributions received into my account during the above financial year are mandated employer contributions.
- I have not worked for at least 40 hours in a period of not more than 30 consecutive days during the above financial year. I acknowledge that contributions for me (other than mandated employer contributions) made during this period cannot be accepted and understand that any such contributions already made in the financial year will be refunded.

If you are aged 75 or over:

- The only contributions that have and will be made on my behalf during the above financial year are **mandated employer contributions*****.

Please note: if you cannot make either declaration, contributions made during this period can generally not be accepted and any such contributions already made in the financial year will be returned if this declaration is not received within 30 days.

- * Personal and employer contributions can be accepted if they are received within 28 days after the end of the month in which you reached age 75, provided you make the first of the above declarations.
- ** Gainfully employed means employed or self-employed for gain or reward in any business, trade, vocation, calling, occupation or employment.
- *** Mandated employer contributions are contributions made by your employer under the superannuation guarantee (before reaching age 70), or under an agreement certified, or award made, by an industrial authority. They do not include salary sacrifice contributions or contributions that your employer makes under an employment contract that has not been certified by an industrial authority. Before completing the declaration, we suggest that you confirm with your employer whether your contributions meet these requirements.

3. Declaration

I declare that the information above is a true and accurate representation of my circumstances and will notify Macquarie Investment Management Limited if my circumstances change.

Signature (in black ink)

Name

Date

Please return the completed form.

Post to:

Macquarie Life
GPO Box 5216
Brisbane QLD 4001

Or fax to:

1800 812 175