

Macquarie Vision

Notification of eligibility for superannuation contributions

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492
Macquarie Superannuation Plan ABN 65 508 799 106



Use this form to confirm your eligibility to make certain contributions to superannuation from age 67

If you are age 67 to 74 (inclusive),¹ or turning 67 in the financial year stated below and intend to continue making contributions once you reach age 67, you must meet the work test, or work test exemption, before we can accept certain superannuation contributions, including:

- non-mandated employer contributions eg salary sacrifice
- personal contributions
- spouse contributions (which can only be accepted until the member turns 75).

Important information

This form is not required to be completed:

- for us to accept mandated employer contributions, such as superannuation guarantee or contributions that satisfy an industrial award or agreement
- if you are making a downsizer contribution. If you wish to make this type of contribution, please complete the relevant Australian Taxation Office form and provide it to us when or before the contribution is made.

Before completing this form, we suggest that you confirm with your adviser whether you are eligible to contribute.

What it means to meet the work test

- You have been gainfully employed² for at least 40 hours in a period of not more than 30 consecutive days during the financial year in which the contribution is made. The work test must be met before the contribution can be accepted by the fund.

What it means to satisfy the work test exemption

- You were gainfully employed² for at least 40 hours in a period of not more than 30 consecutive days in the previous financial year, **AND**
- Your total superannuation balance at the end of the previous financial year was less than \$300,000, **AND**
- You have not previously relied on this work test exemption to make contributions in any prior financial year.

Note: The Work Test Exemption can only be used to make contributions in the financial year you satisfy the exemption criteria.

1

Personal details

Account number:

Account name:

For the financial year ending **30 June 2022**

2

Eligibility to contribute

Please complete the declaration most appropriate to your circumstances.

I've met the work test requirement **OR** I satisfy the work test exemption

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.

! Please note that electronic or digital signatures will not be accepted.

Signature

Full name:

Date:

¹ Member, spouse and non-mandated 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 above declarations.

² Gainfully employed means employed or self-employed for gain or reward in any business, trade, vocation, calling, occupation or employment.

Please complete and return the form via email to vision@macquarie.com,
by post to **Macquarie Vision, GPO Box 4045, Sydney NSW 2001**.
If you have any queries about completing this form please contact your adviser
or us on **1800 501 562**.

