

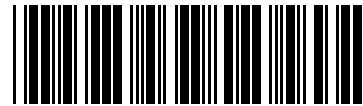
**Essential Super**


Contribution Declaration

(To be completed by investors aged 65 and over)

SAVE AS FORM

PRINT FORM



 Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL LETTERS**. Mark appropriate answer boxes with a cross like the following . Start at the left of each answer space and leave a gap between words.  
To Essential Super, Reply Paid 86495, Sydney NSW 2001

**1 Account and contribution details**

Given name(s)

Surname

Account number

**2 Eligibility to contribute (Please tick the box which applies to your situation)**If aged from 65 to 74<sup>1,2</sup>; and

- I declare that I have been gainfully employed for at least 40 hours in a period of 30 consecutive days or less in the  financial year (this declaration is generally required where any voluntary contributions<sup>3</sup> will be made during the financial year).

Please note: that if a financial year is not nominated, we will default to the current financial year.

OR

- I declare that I am eligible to contribute under the work test exemption<sup>4</sup>:
- I have not been gainfully employed for at least 40 hours in a period of 30 consecutive days or less, or on a part-time or full time basis (30 hours per week), in the  financial year
  - I was gainfully employed for at least 40 hours in a period of 30 consecutive days or less in the previous financial year
  - My total superannuation balance at 30 June of the previous financial year was less than \$300,000<sup>5</sup>

Please note: this option is only available from 1 July 2019.

OR

- I declare that all contributions to be made to my superannuation fund in the  financial year are Super Guarantee contributions, employer certified agreement contributions, award contributions or downsizer contributions<sup>6</sup>.

If aged 75 or older:

- I declare that all contributions to be made to my superannuation fund in the  financial year are Super Guarantee contributions, employer certified agreement contributions, award contributions or downsizer contributions<sup>6</sup>.

1 It is not possible to make spouse contributions for an eligible spouse once they have turned age 70, regardless of your working status.

2 This includes 28 days after the end of the month in which you turn 75.

3 Voluntary contributions include personal contributions, spouse contributions made for you by your spouse and voluntary employer contributions (eg salary sacrifice).

4 Once you have used the work test exemption for a financial year, it cannot be used again in the future.

5 Visit MyGov to find and manage your total superannuation balance.

6 Downsizer contributions can be made regardless of your work status. While you must be aged 65 or over to qualify, no upper age limit applies.

**3 Signature**

Signature

Print name

Date signed

Please sign and date this form and return to: Essential Super, Reply Paid 86495, Sydney NSW 2001.