

Employment questionnaire for members aged 65-74

For assistance & enquiries: **Ph 132 467**Please send this completed form to: **Intrust Super, GPO Box 1416, Brisbane QLD 4001**

Please write in BLOCK letters using a BLUE or BLACK pen. This request will be invalid if it is unsigned or undated.

1: Member details

Intrust Super member number

Mr/Mrs/Ms/Miss Surname

Given Names

Telephone (Home)

Mobile

Date of Birth (DDMMYYYY)

Email

POSTAL ADDRESS

Street number/PO Box

Street name

Suburb/Town

State

Post code

2: Employment questionnaire

By law, if you are aged between 65 and 74 you are required to complete a declaration confirming your working hours for each financial year that you, or your employer on your behalf, contributes to your account.

Please note: The 2018 Federal Budget included an announcement that from 1 July 2019, those with an account balance below \$300,000 will have an extra year to contribute from the end of the financial year when they last met the test.

Accepting personal and employer additional contributions in this financial year

Have you been gainfully employed at least 40 hours in not more than 30 consecutive days in the current financial year?

YES NO

3: Tax File Number [TFN]

Under the *Superannuation Industry [Supervision] Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change.

The Trustee of Intrust Super may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing to Intrust Super that your TFN not be disclosed to any other superannuation provider. It is not an offence not to quote your TFN. However, giving your TFN to the Trustee of Intrust Super will have the following advantages [which may not otherwise apply]:

- Intrust Super will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Tax File Number [TFN] details

Tax File Number

- I give Intrust Super permission to search for lost super on my behalf using my TFN.
I understand that Intrust Super will retain this authorisation until I advise otherwise.

4: Declaration

I declare that the information provided on this form is correct. I understand that, if I have not been gainfully employed for 40 hours in not more than 30 consecutive days in the current financial year, I can no longer make personal contributions or receive voluntary employer financed contributions (including salary sacrifice).

Signature

Date [DDMMYYYY]