



Perpetual WealthFocus Super Plan

Work Test Declaration Form

Confirmation of eligibility to contribute for a member of the Perpetual WealthFocus Super Plan – age 67 to 74 years. Further explanation located over the page.

1. Your personal details

Name:			
Client number:		Account number:	

I hereby confirm:

Contributions work test declaration (tick only one box)

During this financial year:

- I was gainfully employed^ at least 40 hours over a period of not more than 30 consecutive days
- I am claiming a work test exemption. I confirm that I met the work test in the previous financial year, I have not claimed this extension in the past and my total superannuation balance was below \$300,000 on 30 June in the previous financial year.
- I have not met the current work test criteria for this financial year at this time. I understand that I can only have mandated employer contributions made to my Super Plan.

Name	
Email	
Signature	Date: ____/____/____
.....	

Please send your completed form to this address (no stamp required if posted in Australia) or by email.

Mail Reply Paid 4171, Perpetual WealthFocus Super Plan, GPO Box 4171, Sydney NSW 2001

Email investments@perpetual.com.au

Website www.perpetual.com.au

Gainfully Employed

^Gainfully employed means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment. Unpaid work does not meet the definition of 'gainfully employed'

This means that if you are aged 67 to 74:

- you, your spouse and your employer can make contributions; and
- your employer can make mandated contributions on your behalf.
- Any personal contributions must be received by us no later than 28 days after the end of the month that you turn 75

Please note: if you satisfy the Work Test requirements at a later date during this financial year and would like to commence contributing you will need to contact Perpetual on 1800 022 033 to complete a new declaration. If you don't meet the work test, any work test dependant contributions made after age 67 during the financial year will be returned to you. We can accept downsizer contributions even if you do not meet the work test.