

Employment Questionnaire

For members aged 67-74

Please use **BLOCK LETTERS** and **BLACK INK** when completing this form. This request will be invalid if unsigned by the member.

Return this completed form to either:

Email: mail@legalsuper.com.au

OR

Post: legalsuper

Locked Bag 5081

Parramatta NSW 2124

Phone: 1800 060 312

Section 1: Member Details

legalsuper Membership Number (if known)

Mr Mrs Ms Miss Dr Justice

Gender

Male Female

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone number

Mobile Number

Email

Occupation

- Judge
- Barrister
- Solicitor/Lawyer
- Management staff
- Administration/Support staff
- Other (please specify)

Section 2: Employment Questionnaire

Accepting personal tax deductible contributions

From 1 July 2022, anyone aged 67 to 74 (under 75) is no longer required to meet the previous work test criteria for personal and salary sacrificed contributions including non-concessional contributions made under the 'bring forward rule' (subject to existing contribution cap limits and eligibility criteria).

However the work test rule will continue to apply (for ages between 67 and 74) for personal deductible contributions.

Section 3: Information about collection of tax file numbers

We are required to tell you the following details before you provide your tax file number (TFN).

Your TFN is confidential, and you should know the following things before you decide to provide it:

Under the *Superannuation Industry (Supervision) Act 1993*, legalsuper is authorised to collect, use and disclose your TFN.

legalsuper may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request legalsuper, in writing, not to disclose your TFN to any other superannuation provider.

Declining to quote your TFN to legalsuper is not an offence. However giving your TFN to legalsuper will have the following advantages:

- legalsuper will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits; and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

The consequences of not providing your TFN may change in future as a result of legislative changes.

If you do tell us your TFN, we will treat it as confidential and use it for legal purposes, such as:

- to calculate tax on any Eligible Termination Payment you may be entitled to;
- to give your TFN to the relevant authority, if we are paying unclaimed money;
- to give your TFN to the Commissioner of Taxation if you receive a benefit; and
- if we transfer your benefits to another superannuation fund or a retirement savings account.

These purposes may change in future as a result of legislative changes. If you do not want us to do this, you can notify us in writing not to do so.

For more information, please contact your tax advisor or legalsuper administration.

My tax file number is

OR

I do not wish to provide my Tax File Number.

Section 4: Declaration for Personal Tax Deductible Contribution

In order for legalsuper to accept your tax deductible contribution from age 67 to less than age 75, you are required to select "Yes" to the following:

I have worked at least 40 hours within a period of 30 consecutive days in the financial year that this contribution relates to.

YES

NO

I declare that all the information supplied by me on this form is correct and that I have supplied legalsuper my tax file number (see Section 3 overleaf).

Member's signature

Date (dd/mm/yyyy)

Voluntary cashing of benefits

If you wish to withdraw your benefit, you can obtain a benefit payment request form by calling legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday).