

Australian Expatriate Superannuation Fund

Work Test Declaration

Form **11**

The Trustee

will only accept this form if it is correctly and fully completed.

Any questions, call
Member Services 1300 323 489

Under superannuation law, the Trustee can only accept certain types of contributions after you reach age 67, provided that you have met the work test. This means that you can make contributions into your AESF superannuation account providing you have been gainfully employed* for at least 40 hours in a period of not more than 30 consecutive days during the financial year.

Once the work test has been met for the financial year and you are aged 67 or over but less than 75, you can make or continue to make voluntary member contributions into your super within that financial year. Member contributions include after-tax [non-concessional] and member tax-deductible [self-employed] contributions. If you are aged 75, we can only accept these types of contributions if it is being paid within 28 days after the end of the month in which you turn 75. You will also be able to receive or continue to receive employer voluntary contributions such as salary sacrifice contributions within that financial year. For more information about contribution rules, please refer to the Product Disclosure Statement [PDS] and Member Guide on our website aesf.com.au

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

1. Member details

Member number/s

Date of birth
[dd/mm/yy]

Full name

Email address

2. Declaration

When complete

email and post this form:

australia@ivcm.com

IVCM (Aust) Pty Ltd
PO Box 7403
Baulkham Hills
NSW, 2153

YES, I am aged 67 to 74 years [inclusive] and have been gainfully employed* for at least 40 hours in a period of not more than 30 consecutive days in this financial year.

Note: We can still receive contributions for you once you've met the work test for the current financial year. If you don't meet the work test, any contributions made under the work test after age 67 during the financial year must be returned to you.

Member Signature

Date [dd/mm/yy]

Issued by the Trustee
Tidswell Financial Services Ltd
ABN 55 010 810 607
AFSL 237628
RSE Licence L0000888