

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:
 legalsuper
 Locked Bag 5081
 Parramatta NSW 2124
 Phone: 1800 060 312
 Email: mail@legalsuper.com.au

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 contributions

If you are aged between 67 and 74, you are required to complete a declaration confirming your employment each financial year in which you or your employer contributes into your superannuation account.

To be eligible to contribute, you must have been gainfully employed for at least 40 hours within a period of 30 consecutive days in the financial year in which you or your employer made a contribution.

You are also eligible to contribute for 12 months from the end of the financial year in which you last met the work test, provided that your total superannuation balance is below \$300,000.

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

In order for legalsuper to accept your contribution, you are required to select 'YES' to either Option One or Option Two below:

Option One:

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

Option Two:

I have a total superannuation balance below \$300,000 and worked at least 40 hours within a period of 30 consecutive days last financial year.

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).