

Notification of Eligibility for Superannuation Contributions

Members of the Insurance-only Division of the Macquarie Superannuation Plan



Macquarie Investment Management Limited (MIML) ABN 66 002 867 003 AFSL 237 492 RSEL L0001281

Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

Use this form to confirm your eligibility to make contributions to the Insurance-only Division of the Macquarie Superannuation Plan from age 65.

1

Personal details

Policy number:	<input type="text"/>		
Title:	<input type="text"/>	Full given name(s):	<input type="text"/>
Surname:	<input type="text"/>		
Compulsory:	For the financial year 1 July 20 <input type="text"/>	to 30 June 20 <input type="text"/>	

2

Declaration of eligibility to contribute to the Insurance-only Division

Please complete the declaration most appropriate to your circumstances.

If you are aged between 65 and 75* (inclusive) or turning 65 in the financial year stated above:

- I have been gainfully employed** for at least 40 hours in a period of not more than 30 consecutive days during the above financial year prior to making the contributions OR
- Employer contributions received into my account during the above financial year are mandated employer contributions***.

Please note: If you do not meet either of the above eligibility criteria the contributions already received or to be received will be returned to the contributor. Other documentation may be required to facilitate this.

If you are aged 75 or over:

- The only contributions that have and will be made on my behalf during the above financial year are mandated employer contributions.***

* Personal and employer contributions can be accepted if they are received within 28 days after the end of the month in which you reached age 75, provided you make the first of the above declarations.

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

*** Mandated employer contributions are contributions made by your employer under the Superannuation guarantee (before reaching age 70), or under an agreement certified, or award made, by an industrial authority. They do not include salary sacrifice contributions or contributions that your employer makes under an employment contract that has not been certified by an industrial authority. Before completing the declaration, we suggest that you confirm with your employer whether your contributions meet these requirements.

I declare that the information above is a true and accurate representation of my circumstances and will notify Macquarie Investment Management Limited if my circumstances change.

Signature

Date:

Full given name(s):

Surname:

Macquarie Investment Management Limited (MIML) ABN 66 002 867 003 AFSL 237 492 is the trustee of the Insurance-only Division of the Macquarie Superannuation Plan ABN 65 508 799 106. MIML is not an authorised deposit-taking institution for the purposes of the Banking Act 1959 (Cth), and its obligations do not represent deposits or other liabilities of Macquarie Bank Limited ABN 46 008 583 542. Neither Macquarie Bank Limited, nor any other company in the Macquarie Group, guarantees or otherwise provides assurance in respect of the obligations of MIML. Zurich Australia Limited ABN 92 000 010 095 AFSL 232510 (Zurich) is the provider of insurance to members of the Insurance-only Division. Zurich receives instructions from members of the Insurance-only Division on behalf of MIML.

Please return all relevant forms by mail to Zurich Customer Care, Locked Bag 994, North Sydney, NSW, 2059 by email life.insurance@zurich.com.au or by fax **1800 812 175**