

Please send this completed form to:  
Intrust Super, GPO Box 1416 Brisbane QLD 4001

Phone: 132 467

## MEMBER DETAILS

MEMBERSHIP NUMBER	DATE OF BIRTH	GENDER	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> MALE	<input type="checkbox"/> FEMALE
MR/MRS/MS/MISS	SURNAME	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
GIVEN NAMES			
<input type="text"/>			
STREET NUMBER / PO BOX		STREET NAME	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
SUBURB / TOWN		STATE	POSTCODE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TELEPHONE NUMBER			
<input type="text"/>			

## EMPLOYMENT QUESTIONNAIRE

### A. Voluntary cashing benefits

The law allows you to access your superannuation benefits on or after age 65, even when you are gainfully employed. If you are still receiving employer contributions or intend to make voluntary contributions you will need to keep a balance of \$1,000 in your account. You can make a cash withdrawal from you account by completing a Benefit Payment Application at any time.

### B. Accepting personal and employer additional contributions in this financial year

Have you been gainfully employed at least 40 hours in not more than 30 consecutive days in the current financial year?

YES  NO

**Maximum amount of contributions:** From 1 July 2007, the Government has imposed an annual cap of \$150,000 on voluntary personal contributions for members aged over 65. If your contributions exceed the cap in any one year, the Tax Office will send you an assessment notice and require you to pay tax at the highest marginal rate on the excess amount. The Government has also imposed an annual cap of \$100,000 on concessional (which includes employer) contributions, for members aged 50 or older. Once again if you exceed the cap you will be required to pay tax at the highest marginal tax rate on the excess.



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## TAX FILE NUMBER

I agree to provide my TFN  Yes MY TFN IS

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

## DECLARATION

I declare that the information provided on this form is correct. I understand that, if I have not been gainfully employed for 40 hours in not more than 30 consecutive days in the current financial year, I can no longer make personal contributions or receive voluntary employer financed contributions (including salary sacrifice).

SIGNATURE



DATE