

Retirement Declaration form

Return this completed form to:

Please use **BLOCK letters and black ink** when completing this form. If you have any questions in relation to completing this form, please contact legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday) or at **mail@legalsuper.com.au**. This form will be invalid if unsigned or undated by you (see Section 4).

legalsuper
Locked Bag 5081
Parramatta NSW 2124
Phone: 1800 060 312

1. Personal details

Membership number

Date of birth (dd/mm/yyyy)

Mr Mrs Ms Miss Dr Justice

Surname

Given names

Street/Unit No.

Street name

Suburb/Town/City

State Postcode

Occupation

Telephone (daytime contact)

Email

Trading name of last employer to contribute to legalsuper on your behalf

Is this your current employer?

Yes No

Date left employment (if applicable) (dd/mm/yyyy)*

* Please provide this date if you tick box 2A or box 2B below.

2. Retirement declaration

I declare that I am:

- A. of preservation age* or over and have permanently retired**
- B. age 60 or over and have ceased an employment arrangement after turning 60
- C. age 65 or over (NB: you can still be working)

* Your preservation age will be between 55 and 60 depending on your date of birth. Please refer to your legalsuper *Product Disclosure Statement* for further information.

** Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, profession, calling, occupation or employment.

3. Privacy & Authorisation

Privacy

Please note that by sending legalsuper personal information about yourself, you are agreeing to the following:

1. That you have read the legalsuper Privacy Policy and understand how legalsuper intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information;
2. That legalsuper can use it for the purposes of running your superannuation account.

If you would like more information on privacy law requirements or a copy of legalsuper's Privacy Policy, please call legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday) or visit **legalsuper.com.au**

4. Declaration

I declare that:

- The information contained in this form is true and I acknowledge that responsibility for its completeness and accuracy is mine; and
- I agree, and have previously agreed, that my superannuation held in legalsuper is governed by the terms and provisions of the legalsuper Trust Deed as in force from time to time.

Member's signature

Date (dd/mm/yyyy)

Please note that any transfers/switches from a legalsuper Transition to Retirement Pension to a legalsuper Pension will count towards, and be subject to, your Transfer Balance Cap. We strongly recommend you seek the advice of a licensed financial adviser before making such a transfer/switch.