



IOOF

ESSENTIAL SUPER

1 July 2019

Retirement Declaration Form

Please use this form to notify the Trustee that you have retired or ceased work.

Please complete these instructions in BLACK INK using CAPITAL LETTERS (except for your email address) and ✓ boxes where provided. Any personal information provided in this form will be handled in accordance with the Trustee's privacy policy, available at www.ioof.com.au/privacy.

Step 1: Member details

Account number (if known)

Title (Dr/Mr/Mrs/Ms/Miss) Surname

Given name(s)

Residential address

Suburb State Postcode

Mailing address (if different from above)

Suburb State Postcode

Phone (home) Phone (work)

Mobile

Email

Step 2: Declaration and signature

Please tick ONE of the statements below.

- I have reached my preservation age¹, I am permanently retired², and do not intend to return to work again.
- I am aged 60 or more and have terminated employment with my employer on / / which was after my 60th birthday.

I declare that I am either the Member or personal representative of the Member whose details appear above.

Signature Date / /

Name (if a Representative of the Member)

Please sign and return this form to

Post IOOF Essential, GPO Box 264 Melbourne VIC 3001
Telephone 1800 913 118

Email clientfirst@ioof.com.au
Web www.ioof.com.au

1 Your preservation age will be between 55 and 60 depending on your date of birth.
2 Means an arrangement under which you were gainfully employed has come to an end and you do not intend to become gainfully employed for 10 or more hours per week in the future. Gainfully employed means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment.