



1 July 2017

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.

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, Reply Paid 264, Melbourne, VIC 8060
Email: clientservices@ioof.com.au
Telephone: 1800 062 963
Facsimile: 1800 558 539

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.
 IOOF Investment Management Limited | ABN 53 006 695 021 | AFS Licence No. 230524 as Trustee of the IOOF Portfolio Service Superannuation Fund | ABN 70 815 369 818