

# Retirement Portfolio Service Employment Declaration

August 2022

## Zurich Australia Limited (Zurich, OnePath)

ABN 92 000 010 195 AFSL 232510

## Retirement Portfolio Service (Fund)

ABN 61 808 189 263, RSE R1000986

## OnePath Custodians Pty Limited (OnePath Custodians)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

## Customer Care

**Phone** 133 667

**Email** [client.onepath@zurich.com.au](mailto:client.onepath@zurich.com.au)

**Website** [onepath.com.au](http://onepath.com.au)

## Member details

Policy number

Surname

First name(s)

Contributions made to the Retirement Portfolio Service by you, or on your behalf, are used to pay the premiums for this policy. On or after age 67, and until age 75, contributions to superannuation can only be made if:

- You meet the 'work test' (i.e. you are gainfully employed for at least 40 hours in any consecutive 30 day period) during the financial year in which the contribution is made; or
- You meet the 'work test exemption' (i.e. you do not meet the 'work test' for this financial year, but met the 'work test' for the previous financial year, and you had a **total** superannuation balance below \$300,000 on 30 June of the previous financial year, and you have not already relied on the 'work test exemption' for a previous financial year); or
- The contributions are mandated employer contributions (e.g. superannuation guarantee or award).

OnePath Custodians (the Trustee) cannot take prospective employment into account. You must meet the 'work test' during the financial year before the Trustee can accept the contribution. As you used the 'work test exemption' in relation to this policy in a previous financial year, you are not able to use it again, as Superannuation law only permits it to be used once. Please tick **one** of the boxes below to confirm your eligibility to contribute to superannuation (i.e. pay the premiums under this policy).

I confirm:

- I have met the 'work test' in this financial year.
- The contributions are mandated employer contributions.
- I will not meet the 'work test' for this financial year and therefore cannot make premium payments on my insurance policy. I understand that I will not be protected by my insurance policy.

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

## Privacy Policy

I consent to the collection, use, storage and disclosure of my personal information as described in the Privacy Policies and the Privacy Statement(s) contained in the PDS (including discussing any information obtained from me and any doctors or accountants with the financial adviser associated with this application). OnePath's Privacy Policy is available at [onepath.com.au/about-us/privacy-policy](http://onepath.com.au/about-us/privacy-policy) and OnePath Custodians' Privacy Policy is available at [onepathsuperinvest.com.au/about-us/privacy-policy](http://onepathsuperinvest.com.au/about-us/privacy-policy)

If I have provided personal information about any identified person, I declare that I have their permission to do so and I have informed them of the Privacy Policies and the Privacy Statement(s).

I/We acknowledge that Zurich is a company within the Zurich Financial Services Australia Group. OnePath Custodians is a member of the Insignia Financial Group of Companies comprising Insignia Financial Ltd (formerly known as IOOF Holdings Ltd) ABN 49 100 103 722 and its related bodies corporate (Insignia Financial Group). Zurich and OnePath Custodians are not related bodies corporate.

Signature

Date (dd/mm/yyyy)

**Head office**

**Postal address**

OnePath  
Locked Bag 994  
North Sydney NSW 2059