

Work Test or Work Test Exemption Declaration Form

When a Work Test or Work Test Exemption declaration is needed

From 1 July 2022, if you are aged under 75, you can add to super by making personal contributions, without having to meet the Work Test criteria or Work Test Exemption. However, if you are looking to claim a tax deduction on your contributions, you will need to meet the work test or work test exemption.

Section 1: Personal details

Member number:	<input type="text"/>	Date of birth:	<input type="text"/>
Surname:	<input type="text"/>	Given name(s):	<input type="text"/>
Postal address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
		Postcode:	<input type="text"/>
Email:	<input type="text"/>	Contact phone no.:	<input type="text"/>

Section 2: Work test

To claim a tax deduction on personal contributions, please confirm you meet one of the following options (by ticking one box):

Work Test Criteria

I am between 67 to 74 years of age and have been "gainfully employed" for at least 40 hours during a consecutive 30 day period in the financial year in which I am contributing.

Note: "Gainfully employed" means you are employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment, and generally excludes voluntary or charity work.

Work Test Exemption

I am between 67 to 74 years of age and:

- I do not meet the Work Test Criteria (see above) in the current the financial year;
- I met the Work Test Criteria (see above) **last** financial year;
- had a total superannuation balance of less than \$300,000 at the end of the **last** financial year;
- I have not used the Work Test Exemption to make voluntary contributions in a previous financial year, this is the first request

Please Note: The Work Test Exemption **can only be submitted once**, it must be submitted in the financial year you make your voluntary contributions, and you must satisfy the exemption criteria in that same financial year. You are unable to submit another Work Test Exemption in subsequent years.

Section 3: Declaration

- I understand that the personal information that I have provided on this form will be used for the purposes of administering my account.
- I give permission for the Fund to contact my employer to confirm these details where relevant.
- I understand that the Government imposes caps on the amount that can be contributed to superannuation, and that I have read information on the contribution caps stipulated in the Super Simplifier Product Disclosure Statement.

Member signature: Date:

Please email your completed form to supersimplifier@dash.com.au alternatively, you may post to Super Simplifier Member Administration, PO Box 3528, Tingalpa DC, Qld 4173.

We are committed to respecting the privacy of the personal information you give us.

We have published our Privacy Statement on our website at www.dash.com.au