

Qudos retirement savings account (Qudos RSA) contribution form

Personal contribution advice non concessional contribution only

➤ Contribution advice for a single RSA remittance

RSA holder (name): _____

RSA holder number: _____

Bank staff/member number: _____

➤ Contribution details

Amount: _____

I understand that this contribution is a Non Concessional contribution. Tax is not applicable and I may NOT claim tax deduction. I also understand that there are limits to Non Concessional contributions as per the Qudos RSA Product Disclosure Statement.

Please tick the clause that applies.

I confirm that I am under the age of sixty seven (67).

I confirm I am aged between 67 and 74 (inclusive) and I have been gainfully employed on at least a part-time (at least 10 hours each week) basis during the financial year in which the contribution is made ("Work Test").

I confirm that I am aged between 67 and 74 (inclusive) and meet the following criteria:

- The Work Test wasn't met in the year that the contribution was made, but was met in the immediately preceding financial year; and
- I had a Total Superannuation Balance (across all accounts you hold in the superannuation system) of less than \$300,000 at the end of the previous financial year; and
- I have not previously relied on the work test exemption to contribute to the RSA or another superannuation product.

I understand that the contribution cap rules are only available for one 12-month period in your lifetime. Therefore, if the exemption is relied on to make a contribution and then you return to work, the exemption cannot be used again upon your retirement at a later date. If you cease working and wish to make (or receive) super contributions on or after age 67, we recommend that you consult an appropriately qualified taxation or financial adviser to ensure you have the latest available information, or contact us for general information.

Signature of RSA Holder: _____

Date: ____ / ____ / ____

IMPORTANT NOTICE: If you want to claim a tax deduction for personal contributions you must complete the ATO's "Notice of intent to claim or vary a tax deduction for personal super contributions" form (this is also known as a Section 290-170 Notice), as per Qudos RSA Product Disclosure Statement.

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