

# Retirement Declaration



## Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

To find out more visit [supersa.sa.gov.au](https://supersa.sa.gov.au) or call **1300 369 315**

**Client ID:**  
[Grid for Client ID]

**!** This form is used to inform Super SA that you have met a condition of release. Once Super SA processes this form, you will be considered in the retirement phase for taxation purposes and your investment will be tax exempt.

### 1. Personal details

Title [Grid] Date of birth [D D / M M / Y Y Y Y Grid]  
Given Name(s) [Grid]  
Family Name [Grid]  
Email address [Grid]  
Mobile phone [Grid] Work phone [Grid] Home phone [Grid]  
Street address [Grid]  
Suburb [Grid] State [Grid] Postcode [Grid]  
Postal address (if different from above) [Grid]  
Suburb [Grid] State [Grid] Postcode [Grid]

### 2. Retirement declaration

I declare that:  
 I have reached my Commonwealth preservation age and I am permanently retired from the workforce  
 I have ceased employment after age 60

### 3. Member declaration

I certify that the details above are true and correct.  
- I understand my selected investments will be moved to the tax exempt options and the balance will be reported to the Australian Taxation Office and will count towards my Transfer Balance Cap. If the total of my retirement accounts is more than the Transfer Balance Cap I will be required to remove the excess.  
- I understand that all the current terms and conditions will continue to apply to my income stream arrangements (ie. payment amounts, payment frequency and investment option) unless I request a change by completing the relevant form.  
Signature [Red X] Date [D D / M M / Y Y Y Y Grid]

Contact us  
EMAIL [supersa@sa.gov.au](mailto:supersa@sa.gov.au), or  
POST GPO Box 48, Adelaide SA 5001  
WEBSITE [supersa.sa.gov.au](https://supersa.sa.gov.au)  
MEMBER CENTRE (by appointment only)  
151 Pirie St Adelaide SA 5000  
PHONE 1300 369 315

