

27 February 2026

# 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. Any personal information provided in this form will be handled in accordance with the Trustee's privacy policy, available at [cornerstoneportfolioservice.com.au/privacy](https://cornerstoneportfolioservice.com.au/privacy).

## Step 1: Member details

Account number

Title (Dr/Mr/Mrs/Ms/Miss)  Surname

Given name(s)

Date of birth  /  /

## Step 2: Declaration and signature

Please tick **ONE** of the statements below.

- I have reached my preservation age<sup>1</sup>, I am permanently retired<sup>2</sup>, 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 the member whose details appear above.

Signature

Date  /  /

Please sign and return this form to:

**Post:** Cornerstone Portfolio Service GPO Box 264, Melbourne VIC 3001  
**Email:** [clients@cornerstoneportfolioservice.com.au](mailto:clients@cornerstoneportfolioservice.com.au)  
**Telephone:** 1800 947 974

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.