

## Policy & Application

The Retired Member category is available to SMSF Association Specialist and Associate members that are entering retirement, but still wish to retain some of the benefits of Association Membership.

SMSF Association Membership is renewed on an annual basis with the Membership Year being the period 1 April to 31 March. There are two options available to the retiring Member, depending on the date of retirement:

**Retirement between 1 April and 30 June:** The Member may apply for Retired Member status at renewal and if approved, will be invoiced the annual Retired Member fee. Retired Member benefits will apply from date of approval.

**Retirement between 1 July and 31 March:** The Member pays the full annual fee and will remain a paid-up Specialist or Associate Member following their retirement to the end of that particular Membership Year. The Retired Member will be invoiced the Retired Member annual fee at the commencement of the new Membership Year at which time Retired Member status will commence and benefits applied.

### Eligibility

In order to be recognised as a Retired Member, the SMSF Association Member must comply with the following criteria at the time of application to become a Retired Member:

1. Be a paid-up Specialist or Associate member.
2. Have attained the age of 55 years.
3. Not be gainfully employed within the financial services, SMSF sector or similar (as a continuing requirement).
4. Apply to the SMSF Association in writing in the form prescribed from time-to-time.
5. Comply with the conditions prescribed by the Board from time-to-time.

### Requirements

Upon acceptance by the Association and on commencement of Retired Member status as described above, Specialist Members transitioning to Retired Member status must comply with the following requirements from that time:

1. Cease to use any SMSF Association Specialist trademarks, including words, post-nominals and logos conferred upon them by the Association, in any printed or electronic media.
2. Cease to refer to themselves in any way as an SMSF Association Specialist.

### Benefits

Upon acceptance by the Association, the Retired Member will pay the Retired Member annual membership fee. Retired Members will enjoy the following benefits as long as they maintain Retired Member status:

1. Ability to register for any SMSF Association event including the National Conference, Technical Day Conference, Intensive Workshops and Local Community events at Member rates or Early Bird rates where applicable.
2. Ability to sit on a State or regional Local Community Committee.
3. Receive all SMSF Association electronic communications.
4. Access to the Members area of the SMSF Association website.
5. Receive a range of complimentary trade magazines.
6. No requirement to adhere to the SMSF Association Continuing Professional Development Policy.

# SMSF Association Retired Membership



## Application Form

PLEASE RETURN YOUR FORM TO THE ASSOCIATION VIA EMAIL: [MEMBERSERVICES@SMSFASSOCIATION.COM](mailto:MEMBERSERVICES@SMSFASSOCIATION.COM)

### Personal Details

Full Name: \_\_\_\_\_

Member Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Preferred Address: \_\_\_\_\_  
\_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

### Declaration

In seeking SMSF Association Retired Member status, I confirm that:

1. I have attained the age of 55.
2. I am no longer gainfully employed in the financial services, SMSF sector, or similar.
3. I understand and will comply with the requirements of Retired Member status as outlined in the Retired Member policy.
4. I will notify the Association if at any time I become engaged in gainful employment in the financial services, SMSF sector, or similar and as such become ineligible to retain Retired Member status.

Signature: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

### Office Use Only

Approved

Not approved Comments: \_\_\_\_\_

Title: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_