

# Request to pay part/whole balance of superannuation benefits to member

Under the *Superannuation Industry (Supervision) Act 1993*



## COMPLETING THIS FORM

- Read the important information pages
- Refer to instructions indicated with a ▶
- This form is only for cash payments.

## AFTER COMPLETING THIS FORM

- Sign the authorisation
- Send form and certified proof of identity documents to your superannuation fund.

## Section 1 Personal Details

Title: Mr  Mrs  Miss  Ms  Other

Family name

Given names

Other/previous names

Date of birth Day / Month / Year  
  /   /

Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be tax consequences.

▶ See 'What happens if I do not quote my tax file number?'

Gender Male  Female

Contact phone number

## Residential Address

Address

Suburb

State/territory    Postcode

## Previous address

▶ If you know that the address held by your fund is different to your current residential address, please give details below.

Address

Suburb

State/territory    Postcode

## Section 2 Fund details

### FROM

Fund name

Member Number

If you have multiple accounts with this fund you must complete a separate form for each account you wish to withdraw

### Type of Claim

- Unrestricted non preserved
- Under \$200.00
- Permanently retired (Sign declaration below)

Is this a full withdrawal? Yes  No

If not, please specify amount required \$

Funds to be paid by cheque Yes  No

Funds to be deposited in bank account:

Account name

BSB

Account number

## Section 3 Proof of Identity

▶ See 'Completing proof of identity'

I have attached a certified copy of my driver's licence or passport  
OR

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government or local council notice (< 1 year old) with name and address

SEE OVERLEAF FOR AUTHORISATION AND IMPORTANT INFORMATION

## Section 4 Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- In the case of retirement, I declare I have reached age 55 and have genuinely retired from the workforce.

Name (Print in BLOCK LETTERS)

Signature

Date  Day  /  Month  /  Year

## Completing proof of identity

You will need to provide documentation to prove you are the person to whom the superannuation entitlements belong.

### ACCEPTABLE DOCUMENTS

The following documents may be used.

#### EITHER

##### One of the following documents only:

- driver's licence issued under State or Territory law
- passport.

#### OR

|   |            |  |
|---|------------|--|
| <p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>■ birth certificate or birth extract</li> <li>■ citizenship certificate issued by the Commonwealth</li> <li>■ pension card issued by Centrelink that entitles the person to financial benefits.</li> </ul> | <b>AND</b> | <p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>■ letter from Centrelink regarding a Government assistance payment</li> <li>■ notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address. For example: <ul style="list-style-type: none"> <li>- Tax Office Notice of Assessment</li> <li>- Rates notice from local council.</li> </ul> </li> </ul> |
|---|------------|--|

### HAVE YOU CHANGED YOUR NAME OR ARE YOU SIGNING ON BEHALF OF ANOTHER PERSON?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

| Purpose                           | Suitable linking documents   |
|-----------------------------------|--|
| Change of name                    | Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. |
| Signed on behalf of the applicant | Guardianship papers or Power of Attorney.  |

### CERTIFICATION OF PERSONAL DOCUMENTS

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

### WHAT HAPPENS IF I DO NOT QUOTE MY TAX FILE NUMBER (TFN)?

You are not obligated to provide your TFN to your superannuation fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account, Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.