

## How to apply

Follow the instructions on this form to apply for a payment or transfer from your super.

### 1 Check that you're eligible

You can use this form to request a payment from your super in certain situations. These are listed below.

#### Transferring your account to another super fund

You can transfer some or all of your AustralianSuper account to another complying super fund. If you're only transferring some of your account, you need to leave at least \$5,000, or \$10,000 if you have insurance cover, in your AustralianSuper account. Please check with your employer that any final contributions have gone into your account before you complete this form. If we receive any late contributions, we need to open a new account for you. Any subsequent payment requests will incur another exit fee. If you have insurance cover, see the *Before applying for a payment* section on the other side of this page.

#### Requesting a cash payment from your account

To access your super savings in cash, you generally need to have permanently retired from work and have reached your preservation age.

Your preservation age is 55 if you were born before 1 July 1960. Higher preservation ages apply to younger people.

Visit [australiansuper.com/PreservationAge](https://australiansuper.com/PreservationAge) to find your preservation age.

You can also use this form to access some or all of your super if you:

- have turned 65 (regardless of whether you've retired or not)
- left a job after you turned age 60
- have an account balance of \$200 or less
- have unrestricted non-preserved super (which is usually after-tax contributions made before 1 July 1999)
- are between preservation age and the age of 64, have ceased gainful employment and don't plan to work more than 10 hours a week again.

Temporary residents aren't eligible to apply for a payment under the conditions of release described above.

All cash payments may be subject to tax if made before you've turned age 60.

### You need a different form to apply for a payment from your super in other situations

There are other situations that may allow you to apply for a payment from your super. These include:

- financial hardship – request a payment via your online account at [australiansuper.com](https://australiansuper.com)
- compassionate grounds
- permanently leaving Australia after being a temporary resident
- becoming totally and permanently disabled.

Each of these situations has a different form that you need to complete. Go to [australiansuper.com/AccessSuper](https://australiansuper.com/AccessSuper) for more information.

### 2 Apply to AustralianSuper

To request a payment from your super or to transfer your account to another fund:

- Go to [australiansuper.com](https://australiansuper.com) and log in to your online account
- Choose 'Make a withdrawal from my super account'.



Making your payment request online is easy and means that you can certify your proof of identity online.

If you don't have access to the internet:

- Complete the attached form.
- Read section 1 on page 2 of this form to see the documents you'll need to prove your identity.
- Send your signed form to us.

Once we receive your completed application form and certified documents, it will usually take around five business days to make a cash payment or three business days for your super to be transferred to another fund. This doesn't include time for postage or transfers.

### ! Before applying for a payment ...

#### Your insurance cover

A lower account balance may affect your insurance cover, particularly if your employer doesn't make Superannuation Guarantee contributions to your account. Read the *Important information* section of the *Insurance in your super* guide at [australiansuper.com/InsuranceGuide](https://australiansuper.com/InsuranceGuide), for details about when your cover stops before requesting a payment.

If you're withdrawing your whole account balance, your account will be closed and any insurance cover you have will end.

#### Claiming a tax deduction for super contributions

If you're self-employed or you don't work and receive an income from investments, you might be able to claim a tax deduction for any personal contributions you've made to your super. To claim a tax deduction for personal super contributions, you must send us a *Notice of intent to claim a tax deduction* form before you withdraw your super benefit, transfer any part of your account to a retirement income account or close your account.

We can't accept your *Notice of intent to claim a tax deduction* form after an application for a benefit payment or to open a retirement income account has been processed.

To get a claim form or find out more, go to [australiansuper.com/ClaimDeduction](https://australiansuper.com/ClaimDeduction)

#### Former UK pension funds transferred into your account

If you've transferred a pension fund from the UK into your AustralianSuper account within the last ten years, we're required to report any payments or transfers. And if the UK Government considers you to be a UK tax resident at the time of payment or at anytime during the preceding five UK tax years, you may have to pay tax to the UK Government. The UK Government will contact you regarding any tax you have to pay.

For more information on UK tax, contact HM Revenue & Customs directly at [hmcrc.gov.uk](https://hmcrc.gov.uk) or on +44 135 535 9022. Please have your UK National Insurance number on hand.

## How to certify your documents

Read this section if you choose to attach paper copies of certified documentation to provide proof of your identity.

### 1 Go to your local police station

Take both the ORIGINAL and a photocopy of your CURRENT driver's licence or passport to your local police station. If you are using your driver's licence, you'll need to photocopy BOTH sides.

If you're withdrawing more than \$10,000 you'll need additional ID:

- Above \$10,000 and up to \$50,000: a CURRENT bill (power, telephone) or bank statement.
- Above \$50,000 and up to \$75,000: two CURRENT bills (power, telephone) or bank statements.
- Above \$75,000: three CURRENT bills (power, telephone) or bank statements.

And all ID must have the same name and mailing address that we have for your super account.

### 2 Ask them to certify your ID

To certify your ID, the authorised person needs to compare the photocopy to the ORIGINAL and include the following details on the copy:

- stamp or write 'This is a true and correct copy of the original'
- their qualification (such as police officer)
- their name
- their address and phone number, and
- their signature and the date it was signed.



If you can't get to a police station, a number of other people can certify your ID for you. Go to [australiansuper.com/IDHelp](https://australiansuper.com/IDHelp) for more information.

## Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of 26/50 Lonsdale Street, Melbourne, Victoria, collects your personal information (PI) to run your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to do these tasks. PI is collected from you but sometimes from third parties like your employer. We will only share your PI where necessary to perform our activities with our administrator, service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. A list of countries can be found at the URLs below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details on the above go to [australiansuper.com/CollectionStatement](https://australiansuper.com/CollectionStatement) and [australiansuper.com/privacy](https://australiansuper.com/privacy) or call us on 1300 300 273.



### STEP 3. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the options below.

**Option 1 – I want to use my TFN provided in Step 1**

This option isn't available for cash payments or for transfers to self-managed super funds. By giving us your TFN, you are authorising us to give this information to your other super fund. They will confirm your ID with the Australian Taxation Office.

**Option 2 – I want to use electronic verification**

By giving you my Medicare, driver's licence or Australian passport details below, I authorise the use of my personal details (including the information below) for the purpose of electronic data verification. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

Any TWO of the following:

<p>1. Full name as appears on my Medicare card</p> <p>_____</p> <p>My Medicare number is _____ Valid to _____ My reference number on this card is _____</p> <p>_____ M M 2 0 Y Y</p>	
<p>2. Full name as appears on my driver's licence</p> <p>_____</p> <p>Licence number _____ State of issue _____ Expiry date _____</p> <p>_____ D D M M 2 0 Y Y</p>	
<p>3. My Australian passport number is _____ Place of birth (as shown on your passport) _____</p> <p>Country of birth (not shown on your passport) _____</p> <p>Family name at birth (not shown on your passport) _____</p> <p>_____</p>	

**Option 3 – I want to attach paper copies of certified documentation**

I have attached certified copies of my proof of identity to this form. Please ensure that you provide photocopies of your original identification documents and that they are correctly certified. Each page must be certified as a true copy. For instructions on who can certify documents, go to [australiansuper.com/IDHelp](http://australiansuper.com/IDHelp)

 See page two of this form to check "How to certify your documents".

**Electronic verification if the paper copies of my proof of identity documents are incorrectly certified or can't be read**

I authorise the use of my personal details for the purpose of electronic data verification if the paper copies of my certified documentation are incorrectly certified or unable to be read. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

### STEP 4. ARE YOU WITHDRAWING YOUR WHOLE ACCOUNT BALANCE?

**Yes** – This will close your account and any insurance cover will end. Investment earnings\*, tax and insurance and management costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you complete this form. Choose (X) one of the three options below:

- Withdraw all of my account<sup>†</sup> in cash
  - Transfer all of my account to another super fund
  - Withdraw some of my account<sup>†</sup> in cash and transfer the rest to another super fund
- Amount to withdraw \$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_

**No** – Choose (X) one of the two options below: (you need to leave at least \$5,000 in your account<sup>†</sup>)

- Transfer some of my account to another super fund.
- Withdraw part of my account<sup>†</sup> in cash. Any tax payable will be deducted from this amount.

Amount \$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_

**Go to step 5.**

**Go to step 6.**

\* Investment earnings can be positive or negative.  
<sup>†</sup> All withdrawals attract a \$35 exit fee for each payment.  
<sup>‡</sup> Insurance cover may be affected by a lower account balance. See the *Before applying for a payment* section on page 1.

## STEP 5. CHOOSE THE INVESTMENT OPTION(S) FOR YOUR PAYMENT

From your AustralianSuper PreMixed and DIY option/s  
Write the percentage you want to withdraw from each investment option below. If you leave this blank, your withdrawal will be made equally across all your options.

High Growth	<input type="text"/>	%			
Balanced	<input type="text"/>	%			
Socially Aware	<input type="text"/>	%			
Indexed Diversified	<input type="text"/>	%			
Conservative Balanced	<input type="text"/>	%			
Stable	<input type="text"/>	%			
Australian Shares	<input type="text"/>	%			
International Shares	<input type="text"/>	%			
Property	<input type="text"/>	%			
Diversified Fixed Interest	<input type="text"/>	%			
Cash	<input type="text"/>	%			
<b>Total must add up to 100%</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	%

Complete this section **ONLY** if you're invested in the Member Direct option

If you have super invested in AustralianSuper's Member Direct option, do you want to sell these holdings to make this withdrawal?

(Please choose (X) one option only)

**Yes** – I will sell my Member Direct holdings.

If you have a term deposit, you must be eligible to redeem it before it matures and early redemption costs will apply. See *Your Guide to the Member Direct Investment Option* for details.

**No** – I don't want to sell my Member Direct holdings.

Remember there must be at least \$5,000 invested in the AustralianSuper PreMixed or DIY options after your withdrawal from these options has been made.

## STEP 6. PROVIDE TRANSFER AND/OR PAYMENT DETAILS

To transfer some or all of your account, provide details of your other super fund.

Fund name

Address

Suburb

State

Postcode

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Your other super fund member number

To transfer some or all of your account to a self managed super fund (SMSF), provide details of your SMSF.

If you are transferring to a SMSF, are you a member, trustee or director of the fund?  Yes  No  n/a

SMSF name

Australian Business Number (ABN)

**SMSF bank details:**

Account name

BSB number

Account number

To withdraw some or all of your account in cash, provide your bank account details below.

Account name – must be held in your name or jointly in your name

Name of bank or financial institution

Branch

BSB number

Account number

## STEP 7. SIGN THIS FORM

The information provided on this form is correct and will be used to action my request. I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information. AustralianSuper and its administrator may use my details to check my identity using personal and other information held on electronic databases, including third party databases.

I confirm that I'm not the holder of an Australian Temporary Residency visa (405 and 410 retirement visas excepted).

I understand that a \$35 exit fee will be deducted from my super account for this payment.

I understand that if you receive any contributions after my account has been closed you will open a new account for me. Any subsequent payment requests will incur another exit fee.

I understand that if I withdraw my whole account balance this will close my AustralianSuper account and any insurance cover will end. AustralianSuper will no longer have any responsibility for the account.

**Sign here**



Date

D	D	M	M	Y	Y	Y	Y
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Print full name