

Step 3 – Provide payment instructions (continued)

*A rollover to another fund cannot occur without the ABN and SPIN or Membership/Policy number of the fund you are transferring to. If your rollover fund does not have an ABN, you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.

Option 4: Early release of your superannuation benefit due to financial hardship

You will also need to complete and attach the *Benefit Release due to severe hardship* form. Any approved amount can be paid by cheque.

Option 5: Transfer between divisions

Transfer to Equisuper Personal.

Transfer to an Equisuper Account Based Pension

If you are considering one of these options, please obtain the relevant PDS from our website www.equisuper.com.au or

Helpline 1800 682 626 .

Step 4 – Attach documentation if your name and/or address has changed

If your name and/or postal address differs to that previously advised to the fund, complete the boxes below and provide evidence of this change.

Name changes – attach a certified copy of a Marriage Certificate, Deed Poll or Change of Name Certificate from the Births, Deaths and Marriages Registration Office (see the 'Completing proof of identity' section for details of how to certify documents).

Postal address changes – attach a certified copy of a recent bill, mail item or driver's licence that displays your new postal address.

New name

New postal address

Suburb

State

Postcode

Your personal details cannot be updated unless the necessary supporting documentation is provided.

Step 5 – Select investment options for withdrawal (if not selecting the maximum amount)

Your withdrawal will normally be made in the same proportions as your selected investment options. However, you may select to have your withdrawals made from a particular investment option until the holdings in that option are exhausted.

Please make my withdrawal in the same proportions as my account balance

Please make my withdrawal from the following options :

Diversified options	Dollar (\$) amount	OR	Percentage to be withdrawn
Growth Plus	\$ <input type="text"/>		<input type="text"/> %
Growth	\$ <input type="text"/>		<input type="text"/> %
Balanced Growth	\$ <input type="text"/>		<input type="text"/> %
Balanced	\$ <input type="text"/>		<input type="text"/> %
Conservative	\$ <input type="text"/>		<input type="text"/> %
Sector-specific options			
Australian Shares	\$ <input type="text"/>		<input type="text"/> %
Overseas Shares	\$ <input type="text"/>		<input type="text"/> %
Property	\$ <input type="text"/>		<input type="text"/> %
Fixed Interest	\$ <input type="text"/>		<input type="text"/> %
Sustainable Responsible Investment	\$ <input type="text"/>		<input type="text"/> %
Cash	\$ <input type="text"/>		<input type="text"/> %
Total	\$ <input type="text"/>		1 0 0 %



Step 6 – Complete preservation declaration

If over 55 and retiring permanently from the workforce.

A portion of your benefit may be subject to preservation. If the preserved portion of your benefit is over \$200, legislation requires that this amount be retained in an approved roll-over fund until:

- You are at least 60 years of age and have ceased employment since attaining age 60

OR

- You are 65 years of age or over

OR

- You are between 55 and 60 years old, have ceased employment and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations to allow your benefit payment to be processed.

(select an option)

- Yes, I am at least 55 years of age, have ceased employment and intend to permanently retire from the workforce when leaving this employer.
- Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.
- Yes, I am 65 years of age or over.

Step 7 – Confirm if splitting contributions

Should you wish to split your super contributions with your spouse for the current or previous financial years, you will also need to complete and return a contributions splitting application form. Note that contributions splits cannot be processed after your benefit payment has been made so it is important that any split request is lodged along with (or prior to) these payment instructions.

A copy of the contributions splitting application form, as well as a fact sheet providing additional information on contributions splitting, can be obtained by calling our **Helpline 1800 683 262** or from our website **www.equipsuper.com.au**.

Tick here if you intend to lodge a split request either prior to or with this form.

Step 8 – Provide your tax file number

Should you choose not to provide your Tax File Number additional tax may be deducted, please refer to the *Tax File Number Notification* form for details.

Don't pay more tax than you have to – let us know your tax file number.

Your tax file number is confidential and you don't have to give it to Equipsuper. It is not an offence to not provide your tax file number. However, you may pay more tax than you have to if you don't supply it.

My tax file number is: - -

Or I will not provide my TFN

Special note: The Trustee is required by law to ask for your tax file number. By providing your tax file number, you're allowing the Trustee to use it to:

- find or identify your super when there's no other way
- work out any tax payable
- pass your tax file number to the tax office when you receive your super payout or have unclaimed super money after reaching pension age
- pass your tax file number to any other super fund or account to which your super is transferred in the future, unless you tell the Trustee in writing not to do so
- report details of contributions to the tax office for working out whether any tax is applicable if contributions for you exceed certain limits, and
- where required by law, pass your tax file number to other Government agencies.

If you don't provide your tax file number, now or later:

- you may pay more tax on contributions made by your employer and certain other contributions made by or for you. In some circumstances, you may be able to claim this back, however time limits and other rules may apply
- the Trustee will only be able to accept contributions made for you by your employer. No other contributions, for example, after-tax contributions, can be accepted
- you may pay more tax on your super benefit that you would otherwise (although you can claim this back when you lodge your tax return), and
- it may be more difficult to find your super in the future if you change your address without notifying the Trustee or if you rollover any other super accounts you may have.

The legal purposes for which the Trustee can use your tax file number and the consequences for not quoting your tax file number may change in the future.

Step 9 – Attach certified proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence or passport (or acceptable alternatives). See the 'Completing proof of identity' section for details of certification and acceptable alternative documents.

I have attached a **certified** copy of the appropriate proof of identity.



Step 10 – Sign the form

By signing this form:

- I have read and understood this form
- I understand that the information contained in this form will be handled by the trustee to process my super payout
- I understand that in processing my super payout my personal information may be disclosed to or accessed by administrators, government bodies and other parties as required including the trustees of any other fund I may transfer to – and I consent to this handling of my personal information in this manner
- I approve the deduction of any appropriate exit fees from the amount paid subject to legal restrictions
- I have read and understand the implications of not providing my TFN. If I have not provided my TFN, additional tax may be deducted from my final benefit.
- I understand that under Tax Office regulations, I must keep a copy of this form for five (5) years from the date completed.
- acknowledge that if I've provided my email address details and/or mobile number in this form, the Trustee may, at its discretion, use that email address and/or mobile number to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means

Signature

X

Date

□□ / □□ / □□□□

Please return your completed form to Equisuper, GPO Box 4303, Melbourne VIC 3001.

Step 11 – Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- Provided your member details in **Step 1**?
- Attached supporting documentation for any change of name and/or postal address detailed in **Step 4**?
- Provided complete payment instructions in **Step 3**?
- Signed and dated the form (**Step 10**)?

Completing Proof of Identity

- Have you attached the correct identification as outlined in the 'Completing proof of identity' section? Select the identification you have provided:
 - One Primary identification document; or
 - Two Secondary identification documents (one from each of the lists specified); or
 - Both foreign identification documents.
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is also acceptable.
- Do the details on your identification (name/address) match the details you have provided in Step 1 of this form?
- Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
 - Written or stamped 'certified true copy'
 - Signature and printed name
 - Date – the date MUST be within twelve months of the date we receive your completed form.
 - Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the 'Completing proof of identity' section for more details on how to certify a document and a list of valid certifiers.



Completing proof of identity

What you need to provide before your payment can be processed

Primary Photographic Identification

You will need to provide a **certified** copy of **one** of the following primary identification documents:

- Current Australian or foreign driver's licence containing a photo, address and signature
- Australian passport containing a photo and signature that is current or expired within the last two years
- Current foreign passport, or similar document issued for the purpose of international travel, containing a photo and signature
- Current card issued under a State or Territory for the purpose of proving a person's age, including a photo
- Current national identity card issued by a foreign government for the purpose of identification, containing a photo and signature

Secondary Identification

If you are unable to provide any primary identification, you will need to provide a certified document from each of the following lists:

Provide ONE of the following primary non-photographic identification documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits

AND

ONE of the following secondary identification documents containing your name and residential address:

- letter from Centrelink (or other Government body) within the past twelve months regarding a Government assistance payment
- Tax Office Notice of Assessment issued within the past twelve months
- rates notice from local council issued within the past three months
- electricity, gas or water bill issued within the past three months

What is a certified copy?

The copy of the identification document provided **MUST be certified** as a true and correct copy by a person authorised to do so. Please see below for information on how to, and who can, certify documents.

How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- Written or stamped 'certified true copy'
- Signature and printed name
- Date (the date of certification must be within twelve months prior to the date the form is received by us)
- Qualification (such as Justice of the Peace, Australia Post employee, etc).

Who can certify documents in Australia

Any one of the following authorised persons can certify documents as being true and correct copies:

1. A person who is currently licensed or registered under a law to practice in one of the following occupations:

Chiropractor	Dentist	Legal practitioner	Medical practitioner
Nurse	Optometrist	Patent attorney	Pharmacist
Physiotherapist	Psychologist	Trade marks attorney	Veterinary surgeon

2. A person enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner

3. A person on the following list:

- **Australia Post Permanent Employee or Agent** (who is currently employed with the post office & has at least two continuous years of service or is in charge of supplying postal services to the public)
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank Officer, Building Society Officer or Credit Union Officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Justice of the Peace**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)

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Completing proof of identity

- **Member of Chartered Secretaries Australia**
- **Member of Engineers Australia** (other than at the grade of student)
- **Member of the Association of Taxation and Management Accountants**
- **Member of the Australasian Institute of Mining and Metallurgy**
- **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- **Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants**
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Australia Post Permanent Employee** (who is currently employed with the post office and has at least two continuous years of service)
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority with two or more years of continuous service**
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Police Officer or Sheriff**
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
- **Court Officer:**
 - Registrar or Deputy Registrar of a Court
 - Judge
 - Clerk
 - Magistrate
 - Master of a Court
 - Chief Executive Officer of a Commonwealth Court

4. Officer with, or Authorised Representative of an Australian Financial Services Licensee (who has had at least two years of continuous service with one or more licensees)

Who can certify documents outside of Australia

- an authorised staff member of an Australian Embassy, High Commission or Consulate
- an authorised employee of the Australian Trade Commission who is in a country or place outside Australia
- an authorised employee of the Commonwealth of Australia who is in a country or place outside Australia
- a Member of the Australian Defence Force who is an officer or a non-commissioned officer with 5 or more years of continuous service
- a notary public, subject to approval by the Fund AML/CTF Officer on a case by case basis. Please contact the Fund for advice prior to obtaining a notary public certification.

Change of name or 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 suitable certified supporting document:

Purpose	Suitable supporting document
Change of name	Certified copy of marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Certified copy of guardianship papers or Power of Attorney

