

Request a full withdrawal of your Choice Income or TTR Income account

Use this form to request full withdrawal and closure of your Choice Income or TTR Income account. If you want to request a partial withdrawal of your account balance, you need to use the form *Request a partial withdrawal of your Choice Income or TTR Income account*.

Member Direct

If you have a term deposit early redemption costs may apply if you're redeeming it prior to maturity. See the Member Direct Terms and Conditions and *Your Guide to the Member Direct Investment Option* for details.

Please complete in pen using CAPITAL letters and print (X) to mark boxes. The form must be completed in full. Read the Privacy Collection Statement on page 5 of this form to see how AustralianSuper uses your personal information.

1 Provide your personal details

Last name

Mr Mrs Ms Miss Dr

First name/s

Date of birth

Member number Account number

Male Female

Street address

Suburb State Postcode

Postal address (if different)

Suburb State Postcode

Telephone (business hours) Telephone (after hours) Mobile

Email

2 Tell us how you are eligible

Choose (X) the option that best describes you.

- I have a **Choice Income account** and I request a full payment and account closure. (go to Step 3)
- I have a **TTR Income account**.

To request a payment you must meet one of the conditions of release. Complete the section below and only choose (X) one.

- I am between my preservation age and the age of 64 and have permanently retired from the workforce.
- I have unrestricted non-preserved super (usually after-tax contributions made before 1 July 1999).
- I'm aged 60 to 64 and have stopped working for an employer since turning 60.

Former employer name:

Date you finished work:

Use this table to find your preservation age

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

- I have a **Choice Income account** or **TTR Income account** and I want to transfer my account to another super fund or self-managed super fund (SMSF).

4 Tell us how you will withdraw your account balance

A full withdrawal will close your account. Investment returns, regular payments, fees, costs and tax will change the final amount paid. If you received a Balance Booster when you opened your Choice Income account, a clawback could apply. See the *Choice Income Product Disclosure Statement* for details.

Choose (x) one of the four options below.

Option 1 - Withdraw all of my account in cash.

(This option is available for Choice Income only. Cash withdrawals are not available for TTR Income members unless you have met a condition of release in step 2.)

Please tell us how to pay this to you.

Make the payment to the same account my regular income payments go to.

Make the payment to a different account - these bank account details will be used for this payment only. You must also provide or attach certified proof of your identity by completing Option 2 or Option 3 under **Step 3. Provide proof of your identity** (page 2).

Name of bank, building society or credit union

Account name (this must be a personal account, held solely or jointly in your name)

BSB number

Account number

Mark (x) this box if you've provided a copy of your bank statement so we can double check your details to avoid any payment delays.

Option 2 - Transfer all of my account to my AustralianSuper superannuation account.

Member number

Option 3 - Transfer all of my account to another super fund or SMSF.

Please provide details.

Transfer to another super fund:

Fund name

Address

Suburb

State

Postcode

Other super fund member number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Transfer to SMSF:

SMSF name

Australian Business Number (ABN)

Electronic Service Address (ESA)

SMSF bank details:



Please attach a copy of a SMSF bank document that clearly displays the SMSF account name, BSB and account number. The document must have been issued within the last 12 months.

Account name

BSB number

Account number

4 Tell us how you will withdraw your account balance (continued)

Option 4 - Withdraw part of my account in cash and transfer the rest to another super fund or SMSF.

Amount to withdraw in cash: \$, ,

Please tell us how to pay this to you. Choose (X) one of the two options below.

- Make the payment to the same account my regular income payments go to.
- Make the payment to a different account - these bank account details will be used for this payment only. You must also provide or attach certified proof of your identity by completing Option 2 or Option 3 under **Step 3. Provide proof of your identity** (page 2).

Name of bank, building society or credit union BSB number

Your account name (this must be a personal account, held solely or jointly in your name) Account number

- Mark (X) this box if you've provided a copy of your bank statement so we can double check your details to avoid any payment delays.

Please also provide details of your other super fund or SMSF:

Transfer to another super fund:

Fund name

Address

Suburb State Postcode

Other super fund member number Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Transfer to a SMSF:

SMSF name Australian Business Number (ABN)

Electronic Service Address (ESA)

SMSF bank details:



Please attach a copy of a SMSF bank document that clearly displays the SMSF account name, BSB and account number. The document must have been issued within the last 12 months.

Account name

BSB number Account number

5 Sign this form

I acknowledge that in certain circumstances AustralianSuper will make a retirement income payment prior to making this withdrawal payment.

The information I have supplied on this application is true and correct at the date of signing this application.

I understand the Trustee of AustralianSuper will disclose my TFN to another super fund if my benefits are being transferred, unless I request in writing that the Trustee does not disclose my TFN to any other super fund.

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

I have read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.

I understand that any cash withdrawal will be treated as a superannuation lump sum payment for tax purposes.

I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).

I understand that if I am invested in the Member Direct option, there may be a delay in withdrawal if a term deposit has to be redeemed before maturity and/or if there are any Corporate Actions pending. Costs for early redemption of term deposits may also apply.

Sign here



Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Print name

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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 Locked Bag 6, Carlton South, Victoria 3053, collects your personal information (PI) to operate, and administer your super account (including insurance) or retirement income account, improve our products and services, and keep you informed. If we can't collect your PI we may not be able to perform these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, Link Group), 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 and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to australiansuper.com/privacy or call us on **1300 300 273**.

How to certify your documents

Read this section if you choose to attach paper copies of certified documentation to provide proof of your identity. Alternatively, you can use electronic verification. See section 3 of the form for details.

1 Get your ID documents and photocopies ready for certification

Take both the ORIGINAL and a photocopy of your CURRENT driver licence, passport or government-issued proof of age card to someone who is authorised to certify ID (e.g. a police officer, a medical practitioner, a lawyer, a post office employee or a financial adviser or planner). If you are using your driver licence or government-issued proof of age card, you'll need to photocopy BOTH sides.

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

- Above \$10,000 and up to \$50,000: either one bill (power, telephone) or one bank statement issued within the last three months.
- Above \$50,000 and up to \$75,000: either two bills (power, telephone) or two bank statements issued within the last three months.
- Above \$75,000: either three bills (power, telephone) or three bank statements issued within the last three months.

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.

Every page of the documents we receive from you must have been certified and dated within the last 6 months. Undated documents will be rejected.



For a list of who can certify your ID for you, go to australiansuper.com/IDHelp for more information.

This page has been left blank intentionally.