

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

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

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 want to request a partial payment. (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

When you tell us that you've met a condition of release, your TTR Income account will turn in to a Choice Income account. Please refer to the *Choice Income PDS* at australiansuper.com/pds for more information.



- I have a **Choice Income account** or **TTR Income account** and I want to make a transfer into another super fund or SMSF.

3 Provide proof of your identity

Please complete (X) one of the options below.

To protect your account, you need to prove your identity when you take a cash payment, move money to a SMSF or move money between super funds.

Option 1 - Use my Tax File Number (TFN) to identify me.

This option is not available for cash payments or transfers to an SMSF. 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 Tax Office.

Enter your TFN here

For how we use your TFN, go to australiansuper.com/RefTFN If you don't provide your TFN you're likely to pay more tax than you need to.



Option 2 - I want to use electronic verification, and I've provided my identification details for TWO of the following documents listed below.

I also authorise AustralianSuper to disclose my name, residential address and date of birth to the credit reporting agency, Illion, for the sole purpose of verifying my identity, by giving you my Medicare, driver licence or Australian Passport details below. I understand that Illion will confirm with AustralianSuper whether my personal information (in whole or in part) matches their credit information file. I also understand that they will not share any other information from my credit file with AustralianSuper.

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.

Fill out any TWO of the following:

1. Full name as appears on my Medicare card <input type="text"/>		
My Medicare number is <input type="text"/>	Valid to <input type="text"/>	My reference number on this card is <input type="text"/>
2. Full name as appears on my driver licence <input type="text"/>		
Licence number <input type="text"/>	Card number ¹ <input type="text"/>	¹ Visit australiansuper.com/IDHelp to find the card number on your driver licence.
State of issue <input type="text"/>	Expiry date <input type="text"/>	
3. My Australian passport number is <input type="text"/>		Place of birth (as shown on your passport) <input type="text"/>
Country of birth (not shown on your passport) <input type="text"/>		
Family name at birth (not shown on your passport) <input type="text"/>		

Option 3 - I want to attach certified paper copies of my documentation.

I have attached correctly certified photocopies of my original driver licence, passport or government-issued proof of age card AND a bill or bank statement issued within the last three months.

Please note that each page of your photocopied documents must have been certified within the last 6 months. For instructions on how to get your document correctly certified and who can do this, please go to australiansuper.com/IDHelp

I also consent to using electronic verification if my paper documentation has been incorrectly certified or can't be read, and I've provided my identification details for TWO of the documents listed above.

4 Tell us how much you would like to withdraw

Choose (X) one of the four options below.

You need to leave at least \$1,000 in your account. 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 available at australiansuper.com/pds

Option 1 - Withdraw part of my account in cash. (Any tax payable will be deducted from this amount.)

Amount \$, ,

Option 2 - Transfer some of my Choice Income or TTR Income account to my AustralianSuper superannuation account.

Amount \$, ,

Option 3 - Transfer a nominated amount to my other super fund or SMSF.

Amount \$, ,

Option 4 - Leave the nominated amount below in my Choice Income or TTR Income account and transfer the balance to my super fund¹.

Amount \$, ,

¹ The amount remaining may vary due to fees, charges and investment returns.

5 Choose the investment option(s) for your payment

Complete this section ONLY if you're invested in Pre-mixed and DIY Mix option/s.

Write the percentage you want to withdraw from each investment option below. If you leave this blank or if the investment options selected and allocated do not add up to 100%, your withdrawal will be made according to the drawdown strategy you have selected for income payments from your account. If you don't have enough money in one or more of your selected options, the balance of your withdrawal will be pro-rated in proportion to the balance in each option.

High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Aware	<input type="text"/> <input type="text"/> <input type="text"/> %
Indexed Diversified	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Stable	<input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %
TOTAL MUST ADD UP TO 100%	<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %

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 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.

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

Remember there must be at least \$10,000 or sufficient money to pay 13 months of income payments, whichever is greater, invested in the AustralianSuper PreMixed or DIY options after your withdrawal from these options has been made.

6 Provide payment details

Step 6a.

Complete this section if you are receiving part of your Choice Income or TTR Income account 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.**

Step 6b.

Complete this section if you are transferring part of your Choice Income or TTR Income account to your AustralianSuper superannuation account, another super fund or SMSF.

Choose (X) one of the three options below.

- Option 1 - partial transfer to your AustralianSuper superannuation fund.**

Member number

- Option 2 - partial transfer to another super fund.**

Fund name

Address

Suburb

State

Postcode

Other super fund member number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

- Option 3 - partial 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

This page has been left blank intentionally.