

# 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).

### 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](https://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.**

By giving you my Medicare, driver licence or Australian Passport details below, I authorise the use of my personal details on this form 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:

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 <sup>1</sup> <input type="text"/>	<sup>1</sup> Visit <a href="https://australiansuper.com/IDHelp">australiansuper.com/IDHelp</a> 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 ( <b>not</b> shown on your passport) <input type="text"/>		
Family name at birth ( <b>not</b> shown on your passport) <input type="text"/>		

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

I have attached my certified proof of identity to this application.

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, see page 5.

**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.

#### 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 certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.

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 certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.

Account name

BSB number  Account number



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