

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

Please consider doing this transaction online – it will be faster and more secure. We can also match your identity document details (e.g. driver's license) against secure databases – you won't need to get verified copies of ID documents. Simply login to your account at australiansuper.com/login and complete the form online. First-time users may need to register at australiansuper.com/register

If you can't transact entirely online, minimise the chances of your documents getting lost or going to the wrong department by sending soft (digital) copies back to us via our [Upload a document page](#).

IMPORTANT: Select *Request a partial withdrawal of your Choice Income or TTR Income* from dropdown menu when uploading your form and documents



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				
<input type="text"/>															<input type="text"/>					<input type="text"/>					<input type="text"/>					<input type="text"/>					<input type="text"/>				
First name/s															Date of birth																								
<input type="text"/>															<input type="text"/>																								
Member number										Account number										Male					Female														
<input type="text"/>										<input type="text"/>										<input type="text"/>					<input type="text"/>														
Street address																																							
<input type="text"/>																																							
Suburb															State					Postcode																			
<input type="text"/>															<input type="text"/>					<input type="text"/>																			
Postal address (if different)																																							
<input type="text"/>																																							
Suburb															State					Postcode																			
<input type="text"/>															<input type="text"/>					<input type="text"/>																			
Telephone (business hours)										Telephone (after hours)										Mobile																			
<input type="text"/>										<input type="text"/>										<input type="text"/>																			
Email																																							
<input type="text"/>																																							

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'm aged 60 to 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:

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

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.



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 payment¹, move money to an SMSF or transfer money between super funds.

¹ If you are requesting a cash payment to the bank account where you receive your regular income payments, go to step 4.

☐ **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	Valid to
<input type="text"/>	<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	Card number ²
<input type="text"/>	<input type="text"/>
State of issue	Expiry date
<input type="text"/>	<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 five 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. 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.)**

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 an SMSF.**

Amount \$, ,

- ☐ **Option 4 – Transfer a nominated amount to my other super fund.**

Amount \$, ,

- ☐ **Option 5 – Leave the nominated amount below in my Choice Income or TTR Income account and transfer the balance² to my AustralianSuper superannuation account, another super fund or SMSF¹.**

Amount \$, ,

¹ The amount transferred may vary due to fees, charges and investment returns, which can be positive or negative.

² Please provide details in Step 6b.

5 Choose the investment option(s) for your payment

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%	1 0 0 %

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

Do you want to sell all or part of your Member Direct investments to make this withdrawal?

(Please choose (X) one option only)

- ☐ **Yes – You must sell any Member Direct investments you wish to withdraw and perform a cash transfer to your other investment options prior to submitting this form.**
- ☐ **No – You must maintain the minimum ongoing balance requirements as set out in the *Member Direct investment option guide* available at australiansuper.com/MemberDirect to continue using Member Direct.**

6 Provide payment details

Step 6a.

Complete this section if you are withdrawing 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 account.

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 an SMSF.

SMSF name

Australian Business Number (ABN)

Electronic Service Address (ESA)

SMSF bank details:



Please attach a copy of an 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

7

I acknowledge that in certain circumstances AustralianSuper will reduce the amount of the withdrawal I have requested. This is to ensure there are adequate funds in my account to meet my remaining income payments for the year.

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 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).

Sign here

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Date _____

D	D	M	M	Y	Y	Y	Y
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Print full name

[illegible]

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 provide these services. PI is collected from you but sometimes from third parties like your financial advisor (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our insurer (TAL Life Limited, ABN 70 050 109 450, AFSL 237848), our contact centre provider (Concentrix Services Pty Ltd), 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](https://www.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

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 pharmacist, a medical practitioner, a lawyer, a post office employee, a financial adviser or planner or a police officer). 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 residential address that we have for your super account.

2

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 'I certify that this document is a true copy of the original sighted by me on this day [date],[month],[year]'
- their qualification (such as pharmacist)
- their registration number (if applicable)
- their name, 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.



Note to advisers:

If you're submitting this form on behalf of a client, please avoid submitting multiple forms at the same time. Submit rollover or transfer-out forms individually to ensure efficient processing within 3 business days.



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