

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 closure of your account balance, 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 to mark boxes. The form must be completed in full. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

STEP 1. PROVIDE YOUR PERSONAL DETAILS

Last name

First name

Date of birth

Male Female

Mr Ms Mrs Miss Dr

Member number

Account number

Street address

Suburb

State

Postcode

Postal address (if different)

Suburb

State

Postcode

Telephone (business hours)

Telephone (after hours)

Mobile

Email

STEP 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. [complete section below]

To request a payment you must meet one of the conditions of release below.

Please 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 want to transfer my account to another super fund.

I'm aged 60 to 64 and still working, but since turning 60 I changed employers.

Former employer name:

Date you finished work:

STEP 3. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the three options below.

To protect your account, you need to prove your identity when you take a cash payment, move money to a self managed super fund 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 for transfers to self-managed super funds. 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

By giving you my Medicare, driver's licence or Australian passport details below, I authorise the use of my personal details (including the information below) 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 it appears on my Medicare card	<input type="text"/>	
My Medicare number is	Valid to	My reference number on this card is
<input type="text"/>	M M 2 0 Y Y	<input type="text"/>
2. Full name as it appears on my Driver's licence	<input type="text"/>	
My Australian Driver's Licence number is	State of issue	Expiry date
<input type="text"/>	<input type="text"/>	D D M M 2 0 Y Y
3. My Australian Passport number is	Place of birth (as shown on your passport)	
<input type="text"/>	<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 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, go to australiansuper.com/IDHelp

Electronic verification if paper copies of certified documentation are incorrectly certified or unable to 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.

STEP 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. For options 2, 3 and 4, each cash withdrawal and transfer payment will attract a \$35 exit fee. 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.

Option 1 – Transfer some of my account to my AustralianSuper superannuation account.

Amount

\$, ,

Option 2 – Withdraw part of my account in cash. (Any tax payable will be deducted from this amount).

Amount

\$, ,

Option 3 – Transfer a nominated amount to my other super fund or self-managed super fund.

Amount

\$, ,

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

Amount

\$, ,

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

STEP 5. CHOOSE THE INVESTMENT OPTION(S) FOR YOUR PAYMENT

From your AustralianSuper PreMixed and DIY option/s
Write the percentage you want to withdraw from each investment option below. If you leave this blank, your withdrawal will be made equally across all your options.

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"/> %
Property	<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

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, you must be eligible to redeem it before it matures and early redemption costs will apply. See *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.

STEP 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.

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 a self-managed super fund.

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)

USI (Unique Superannuation Identifier)

Option 3 – partial transfer to a self-managed super fund

If you are transferring to a self-managed super fund, are you a member and trustee or director of the fund?

Yes

No

SMSF name

Australian Business Number (ABN)

SMSF bank details:

Account name

BSB number

Account number

STEP 7. SIGN THIS FORM

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 and I understand how AustralianSuper will use my personal information.

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

Sign here:



Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print full 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 26/50 Lonsdale Street, Melbourne, Victoria, collects your personal information (PI) to run your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to do these tasks. PI is collected from you but sometimes from third parties like your employer. We will only share your PI where necessary to perform our activities with our administrator, 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. A list of countries can be found at the URLs below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details on the above go to australiansuper.com/CollectionStatement and australiansuper.com/privacy or call us on 1300 300 273.

This page has been left blank intentionally.