

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

First name/s

Member number Account number

Street address

Suburb State Postcode

Postal address (if different)

Suburb State Postcode

Telephone (business hours) Telephone (after hours) Mobile

Email

Mr Mrs Ms Miss Dr

Date of birth

Male Female

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.

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 M M Y Y Y Y <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 D D M M Y Y Y Y <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 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 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"/> <input type="text"/> <input type="text"/> %

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

Account name

BSB number

Account number

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 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
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Print name

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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 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 provide these services. 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 (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. A list of countries can be found at the URL below. Our Privacy Policy details how to access and change your PI, as well as the 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 Go to your local police station

Take both the ORIGINAL and a photocopy of your CURRENT driver licence, passport or government-issued proof of age card to your local police station. 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 need additional ID:

- Above \$10,000 and up to \$50,000: a CURRENT bill (power, telephone) or bank statement.
- Above \$50,000 and up to \$75,000: two CURRENT bills (power, telephone) or bank statements.
- Above \$75,000: three CURRENT bills (power, telephone) or bank statements.

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.



If you can't get to a police station, a number of other people can certify your ID for you. Go to australiansuper.com/IDHelp for more information.

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