

Apply for a payment (family law)

How to apply

Follow the instructions on this form to apply for a super payment following the breakdown of a marriage or de facto relationship.

1 Obtain a valuation of the super account

Get information to value the superannuation. To do this, you must provide us a *Request family law information* form, which combines the following two family law forms:

- a Form 6 Declaration. This confirms you are entitled to get information about the super account for this limited purpose, and
- a Superannuation information request form.

! To get a *Request family law information* form:

- go to australiansuper.com/forms or
- call 1300 300 273 to have a copy sent to you.

A \$50 fee applies when you request a super valuation. Please make your money order or cheque payable to AustralianSuper.

2 Decide how you will split super

Prepare a formal written agreement or obtain a consent or court order, stating how super will be split. You can do this in a number of ways:

- prepare a formal written agreement with the help of a lawyer. The agreement must be accompanied by a signed certificate, stating both you and your former partner have taken independent legal advice about the agreement, or
- seek a consent order to split super. If you and your former partner have reached an agreement from the outset, you can file an application for consent orders in the Family Court, accompanied by a consent order recording the agreement. The orders can be made in chambers without either of you needing to go to court, or
- if you can't reach an agreement with your former partner, you will need to file an application for a court order. Family law registry staff can tell you what forms you need to file. Even when an application is made to a court, it is possible to reach an agreement at any stage without the need for a court hearing.

3 Notify AustralianSuper

If you've reached a formal agreement you should submit a draft copy of the agreement for Trustee approval.

If you're seeking court orders about super, you must tell us in writing and provide a draft copy of the proposed order for Trustee approval. As the super Trustee, we can attend any court hearing and object to any orders if we consider them to be unfair. This is called 'procedural fairness'.

4 Apply to AustralianSuper

The Trustee will review the draft Court Order and advise of any issues that would prevent the Trustee from complying with it. The Trustee has 28 days from the date the draft Court Order is provided to advise if any amendments are needed.

Once the order is made, either by consent or following a court hearing, or your formal agreement has been approved, to split super you need to:

- complete the attached form
- organise a certified copy of the final court order, consent order or superannuation agreement
- organise certified copy/ies of proof of your identity, and
- send your signed form and the other documents to us.

Details and help on certifying documents are on the next page.

! You should get legal advice before deciding what to do. A lawyer can help you understand your legal rights and responsibilities, and explain how the law applies to your case. A lawyer can help you reach an agreement with your former partner without going to court.

Accessing super as cash

To access super as cash, you generally need to be permanently retired and have reached your preservation age. Your preservation age is 55 if you were born before 1 July 1960. Higher preservation ages apply to younger people.

There are other situations where you can access some or all of your super. These are:

- reaching age 65, or
- leaving an employer once you turn 60.

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

These retirement age and access situations relate to the preserved part of super. Any unrestricted non-preserved amounts (usually after-tax contributions made before 1 July 1999) can be withdrawn at any time. You'll pay tax on any super you take as cash if you're aged less than 60.

Transferring your entitlement to another super fund

You can also transfer some or all of your entitlement to another super fund. If you're only transferring some of your entitlement, and leaving the balance in an AustralianSuper account, you need to have a minimum balance of \$5,000 in your AustralianSuper account.

Once we receive your completed application form and certified documents, it will usually take around five business days to make a cash payment or three business days for your super to be transferred to another fund. This doesn't include time for postage for transfers.

What if you don't tell us what to do with your super payment?

If you're already a member of AustralianSuper, this amount will be added to your account based on your current investment choice, less a \$35 processing fee.

If you're not currently with AustralianSuper, we'll transfer your entitlement into a new Personal Plan account in your name (minus a deduction of a \$35 processing fee). This transferred amount will be invested in our Balanced option and is subject to market fluctuations, positive or negative.

You can stay with us as a member of our Personal Plan, transfer your benefit to another super fund or you may be eligible to withdraw your super as cash, subject to super preservation rules.

If you don't return the form, you will remain in your Personal Plan account. You can apply to change your investment choice or transfer your super any time by logging into your online member account at australiansuper.com or call us for help on 1300 300 273.

How to certify your documents

Read this section if you choose to attach paper copies of certified documentation for providing proof of your identity.

1 Go to your local police station

Take both the ORIGINAL and a photocopy of your CURRENT driver's licence or passport to your local police station. If you are using your driver's licence, 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.

And 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.



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.

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.

STEP 3. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the options below.

Option 1 – I want to use my TFN provided in Step 1

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.

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 appears on my Medicare card		
<input type="text"/>		
My Medicare number is	Valid to	
<input type="text"/>	<input type="text"/> M M 2 0 Y Y	
	My reference number on this card is <input type="text"/>	
2. Full name as 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"/>	<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

 See page two of this form to check "How to certify your documents."

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. ARE YOU WITHDRAWING THE WHOLE SUPER PAYMENT?

Yes – Applicable investment earnings, tax and insurance and management costs will change the final amount paid.
I want to: (please choose (X) one of the three options below)

- Withdraw all of my super payment in cash (Go to Step 5)
- Transfer all of my super payment to another super fund
- Withdraw some of my super payment in cash and transfer the rest to another super fund

Amount to withdraw in cash: \$ (Go to Step 5)

 A \$70 processing fee applies to superannuation payment splits. \$35 will be deducted from both accounts when the payment split is made.

STEP 4. ARE YOU WITHDRAWING THE WHOLE SUPER PAYMENT? (Continued)

- No – I want to: (please choose (X) one of the four options below)
- Add all of my super payment to my existing AustralianSuper account.
 - Transfer some of my super payment to another super fund and leave the rest in AustralianSuper.
Amount to transfer: \$ (you need to leave at least \$5,000 in your account)
 - Withdraw part of my super payment in cash and leave the rest in AustralianSuper.
Amount to withdraw in cash: \$ (you need to leave at least \$5,000 in your account) (Go to Step 5)
Any tax payable will be deducted from this amount.
 - Open a new AustralianSuper Personal Plan account. If you're not already a member of AustralianSuper, it's easy to join at australiansuper.com/join

STEP 5. CONFIRM YOU'RE ELIGIBLE FOR A CASH PAYMENT

You have four options (choose (X) one option only). See the information with this form for more details.

- I am aged 65 or more
- I am aged 60 to 64 and have changed jobs since turning 60
Your previous employer
Date you stopped working here

D	D	M	M	Y	Y	Y	Y
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- I am between preservation age and the age of 64, have ceased gainful employment and don't plan to work more than 10 hours a week again.
- I have unrestricted non-preserved super (usually after-tax contributions made before 1 July 1999)

STEP 6. WITHDRAWING YOUR CASH PAYMENT

To withdraw some or all of your account in cash, provide your bank account details below.

Account name – must be held in your name or jointly in your name Name of bank or financial institution

Branch BSB number Account number

STEP 7. PROVIDE PAYMENT DETAILS

To transfer some or all of your super payment, please provide the following details of your other super fund.

Fund name

Address

Suburb State Postcode

Other super fund member number Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

To transfer some or all of your account to a self managed super fund (SMSF), provide details of your SMSF.

If you are transferring to a SMSF, are you a member, trustee or director of the fund? Yes No n/a

SMSF name Australian Business Number (ABN)

SMSF bank details:
Account name BSB number Account number

