

## 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](https://australiansuper.com/forms) or
- call **1300 300 273** to have a copy sent to you.



### 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 \$6,000 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 or 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.

If you're not currently with AustralianSuper, we'll transfer your entitlement into a new Personal Plan\* account in your name. This transferred amount will be invested in our Balanced option and is subject to market fluctuations.

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 and meeting a condition of release.

If you don't return the form, your funds 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](https://australiansuper.com) or call us for help on **1300 300 273**.

\* This information may be general financial advice which doesn't take into account your personal objectives, financial situation or needs. Before making a decision about AustralianSuper, you should think about your financial requirements and refer to the relevant Product Disclosure Statement available at [australiansuper.com/pds](https://australiansuper.com/pds) or by calling **1300 300 273**. A Target Market Determination (TMD) is a document that outlines the target market a product has been designed for. Find the TMDs at [australiansuper.com/tmd](https://australiansuper.com/tmd) AustralianSuper Pty Ltd, ABN 94 006 457 987, AFSL 233788, Trustee of AustralianSuper ABN 65 714 394 898.

## 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.

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](https://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 GPO Box 1901, Melbourne Victoria 3001, 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](https://australiansuper.com/privacy) or call us on **1300 300 273**.

# Apply for a payment (family law)

Please complete in pen using CAPITAL letters and print (X) to mark boxes. Forms must be completed in full. Read the Privacy Collection Statement on page 2 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="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First name/s																								
<input type="text"/>																								
Date of birth								Male		Female														
<input type="text"/>								<input type="checkbox"/>		<input type="checkbox"/>														
Tax File Number								Member number																
<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"/>								

For how we use your TFN, go to [australiansuper.com/RefTFN](http://australiansuper.com/RefTFN) If you don't provide your TFN you're likely to pay more tax than you need to.



## 2 Provide details of member whose super is being split

Last name																				Mr	Mrs	Ms	Miss	Dr
<input type="text"/>																				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First name/s																								
<input type="text"/>																								
Date of birth								Member number																
<input type="text"/>								<input type="text"/>																

### 3 Provide proof of your identity

Please complete (X) one of the options below.

**Option 1 - I authorise AustralianSuper to give my TFN (provided in Step 1) to my other super fund.**

This option is only available if you're transferring funds across to another super fund, not an SMSF. Your other super fund will use it to confirm your ID with the Australian Taxation 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 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's licence <input type="text"/>		
Licence number <input type="text"/>	Card number* <input type="text"/>	* Visit <a href="http://australiansuper.com/IDHelp">australiansuper.com/IDHelp</a> to find the card number on your driver's 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 certified copies of my proof of identity to this form. 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](http://australiansuper.com/IDHelp)

See page 2 of this form to check "How to certify your documents".



**Electronic verification if the paper copies of my proof of identity documents 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.

#### 4 Are you withdrawing the whole account balance?

- Yes** - Applicable investment returns, tax and insurance and management costs will change the final amount paid. I want to: 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 or SMSF
  - Withdraw some of my super payment in cash and transfer the rest to another super fund or SMSF  
Amount to withdraw in cash: \$ , ,  (Go to Step 5)
- 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 or SMSF and leave the rest in AustralianSuper.  
Amount to transfer: \$ , ,  (you need to leave at least \$6,000 in your account) (Go to Step 7)
  - 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 \$6,000 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](http://australiansuper.com/join)

#### 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 stopped working for an employer since turning 60

My previous employer was

I stopped working there on

D	D	M	M	Y	Y	Y	Y
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- 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 am not an Australian Temporary Residency visa holder

##### 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

#### 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

To transfer some or all of your account, provide details of your other super fund.

**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

Your 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.

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

**8 Confirm your order or agreement documents are attached**

I've attached the certified copy of a final court order, consent order or binding financial agreement. All certified copies must have original signatures. For help, read the information sheet before this form.

**9 Sign this form**

The information provided on this form is correct and will be used to action my request. I have read the Privacy Collection Statement on page 2 and I understand how AustralianSuper will use my personal information. Where authorised, AustralianSuper and its administrator may use my details to check my identity using personal and other information held on electronic databases, including third party databases.

I confirm that I am not the holder of an Australian Temporary Residency visa (temporary retirement visas excepted).

Sign here  Date

Print name