

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.



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 to the Trustee for review.

If you're seeking court orders about super, you must tell us in writing and provide a draft copy of the proposed orders to the Trustee for review. 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 satisfy one of the following conditions of release;

- be permanently retired having reached aged 60
- have left and employer having reached aged 60
- reached age 65, even if you haven't retired.

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.

The Trustee has set this minimum balance of \$6,000 to ensure there is enough in your account to cover any fees payable from your account and if you have insurance cover, to ensure this cover does not lapse and the cost of insurance premiums can be met.

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 and invested based on your current investment choice(s).

If you're not currently with AustralianSuper, we'll transfer your entitlement into a new Personal Plan¹ account in your name and invested in AustralianSuper. 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 or call us for help on 1300 300 273.

¹ 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 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

How to certify your documents

Read this section if you choose to attach paper copies of certified documentation for providing proof of your identity. Alternatively, you can use electronic verification. See section 3 of the form for details.

1 Get your ID documents and photocopies ready for certification

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 the 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 a certified copy of ONE bill (e.g. power, phone) or bank statement with the same name and residential address as the claim issued within the previous 3 months.
- Above \$50,000 and up to \$75,000: Certified copies of TWO bills (e.g. power, phone) or bank statements with the same name and residential address as the claim issued within the previous 3 months.

- Above \$75,000: Certified copies of THREE bills (e.g. power, phone) or bank statements with the same name and residential address as the claim issued within the previous 3 months.

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 '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 name
- their registration number (if applicable), 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.

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, 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 employer and your financial adviser (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 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"/>				

AustralianSuper is permitted to collect your Tax File Number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. It's optional to provide your Tax File Number (TFN) but there are several advantages if you do, such as not paying more tax than you need to. For more information about providing your TFN, go to australiansuper.com/RefTFN.



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"/>			

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, 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's 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.

You understand that your 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 <div></div>		
My Medicare number is <div></div>	Valid to <div>MMYYYY</div>	My reference number on this card is <div></div>
2. Full name as appears on my driver licence <div></div>		
Licence number <div></div>	Card number ¹ <div></div>	¹ Visit australiansuper.com/IDHelp to find the card number on your driver licence.
State of issue <div></div>	Expiry date <div>DDMMYYYY</div>	
3. My Australian Passport number is <div></div>		
Place of birth (as shown on your passport) <div></div>		
Country of birth (not shown on your passport) <div></div>		
Family name at birth (not shown on your passport) <div></div>		

- ☐ **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.

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.

See page 2 of this form for information about how to have your documents certified.



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 (Go to Step 7)

☐ 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

5 Confirm you're eligible for a cash payment

You have five 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

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I stopped working there on

D	D	M	M	Y	Y	Y	Y
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- ☐ I'm aged 60 or over and permanently retired
- ☐ I have unrestricted non-preserved super (usually after-tax contributions made before 1 July 1999)

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

[illegible]

Name of bank or financial institution

[illegible]

Branch

[illegible]

BSB number

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Account number

[illegible]

To transfer some or all of your account, provide details of your other super fund in Step 7.

