Apply for a payment



How to apply

Follow the instructions on this form to apply for a full or partial withdrawal or transfer from your super.

Please consider doing this transaction online – it will be faster and more secure. We can also match your identity document details (eg driver's license) against secure databases – you won't need to get verified copies of ID documents. Simply login to your account at australiansuper.com/login and complete the form online. First-time users may need to register at australiansuper.com/register

If you can't transact entirely online minimise the chances of your documents getting lost or going to the wrong department by sending soft (digital) copies back to us via our **Upload a document** page.

IMPORTANT: Select Withdrawal Payment Superannuation from dropdown menu when uploading your form and documents



Check that you're eligible

You can use this form to request a payment from your super in certain situations. These are listed below.

Transferring your account to another super fund

You can transfer some or all of your AustralianSuper account to another complying super fund.

Please note: If you're only transferring some of your account, you'll need to leave at least \$6,000 in your account. AustralianSuper may refuse your request for a payment or only pay out part of your request to ensure your account balance doesn't fall below \$6,000.

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 cover the cost of insurance.

Cover can stop for many reasons. Read the When cover stops section in our *Insurance in your super* guide at **australiansuper.com/InsuranceGuide** to learn more. If you have insurance cover, see the Before applying for a payment section on page 2 of this form.

Check with your employer that any final contributions have gone into your account before you complete this form. If we receive any late contributions, we need to open a new account for you.

To see the limits and proof of ID requirements that apply to you, refer to the *Providing proof of your identity* fact sheet available at **australiansuper.com/IDHelp**

Requesting a cash payment from your account

You can use this form to access some or all of your super if you:

- have turned 65 (even if you're still working)
- stopped working for an employer after you turned age 60
- have an account balance of \$200 or less, and have left the employer who paid your contributions.
- have unrestricted non-preserved super (which is usually after-tax contributions made before 1 July 1999). You canlog into your online account to check if you have any.
- are 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.

Temporary residents aren't eligible to apply for a payment under the conditions of release described above.

All cash payments may be subject to tax if made before you've turned age 60.

To see the limits and proof of ID requirements that apply to you, refer to the Providing proof of your identity fact sheet available at **australiansuper.com/IDHelp**

You need a different form to apply for a payment from your super in other situations

There are other situations that may allow you to apply for a payment from your super. These include:

- severe financial hardship request a payment via your online account at australiansuper.com
- · compassionate grounds
- permanently leaving Australia after being a temporary resident
- terminal illness or permanent incapacity
- the First Home Super Saver Scheme
- transferring your super to KiwiSaver.

Each of these situations has a different form that you need to complete. Go to australiansuper.com/AccessSuper for more information.

Apply to AustralianSuper

To request a payment from your super or to transfer your account to another fund:

- Go to ${\bf australian super.com}$ and log into your account online
- Choose 'Make a withdrawal from my super account'.

Making your payment request online is easy and means that you can confirm your identity online.



If you don't have access to the internet:

- · Complete the attached form.
- Read How to certify your documents on page 2 of this form to see the documents you'll need to prove your identity.
- Send your signed form and certified ID to us.

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.

Before applying for a payment...

It's important to consider:

- how it will impact your retirement
- if you'll have to pay more tax
- any impacts it will have on benefits you're receiving i.e. Centrelink, Work Cover etc
- · AustralianSuper may refuse your request or only pay out part of your request to ensure your account balance doesn't fall below \$6,000.

Your insurance cover

A lower account balance may affect your insurance cover, particularly if your employer doesn't make Superannuation Guarantee contributions to your account. Read the Important information section of the *Insurance in your super* guide at australiansuper.com/InsuranceGuide, for details about when your cover stops before requesting a payment.

If you're withdrawing your whole account balance, your account will be closed and any insurance cover you have will end.

Claiming a tax deduction for super contributions

You might be able to claim a tax deduction for any personal contributions you've made to your super. To claim a tax deduction for personal super contributions you must send us a claim form and receive a confirmation of it

having been processed, before you withdraw your super benefit or close your account.

We can't accept your Notice of intent to claim a tax deduction form after an application for a full benefit payment withdrawal or a request for a full rollover to a retirement income account has been processed. If you request a partial withdrawal from your account, you may be able to claim a partial tax deduction.

To get a claim form or find out more, go to australiansuper.com/ClaimDeduction

Former UK pension funds transferred into your account

If you've transferred a pension fund from the UK into your AustralianSuper account within the last ten years, we're required to report any payments or transfers to HM Revenue & Customs in the UK. And if the UK Government considers you to be a UK tax resident at the time of payment or at anytime during the preceding ten UK tax years, you may have to pay tax to the UK Government. The UK Government will contact you regarding any tax you have to pay.

For more information on UK tax, contact HM Revenue & Customs directly at hmrc.gov.uk or on 001144 3000 533 148. Please have your UK National Insurance number on hand.

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.



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 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 one bill (power, telephone) or one bank statement issued within the last three months.
- Above \$50,000 and up to \$75,000; either two bills (power, telephone) or two bank statements issued within the last three months.
- Above \$75,000: either three bills (power, telephone) or three bank statements issued within the last three months.

All ID must have the same name and residential 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 '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 registration number (if applicable)
- their name, 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



Request to make a full or partial withdrawal or transfer from your super account.

Please complete in pen using CAPITAL letters and print (X) to mark boxes where applicable. Read the Privacy Collection Statement on page 2 to see how AustralianSuper uses your personal information.

Last name Mr Mrs Ms Miss Dr	Provide your person	onal deta	ails														
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Please complete (x') one of the options below. Dotion 1 - I authorise AustralianSuper to give my TFN (provided in Step 1) to my other super fund. This option is only available by our ternaferring 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 life in Million will confirm with AustralianSuper whether my personal information (in whole or in a part of the with AustralianSuper) whether my personal information in my credit file with AustralianSuper. 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. Fill out any TWO of the following. Full name as appears on my Medicare card	3 Provide proof of your identity							
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 Taxabion Office. Option 2 - I want to use electronic verification, and I've provided my identification details for TWO of the following documents listed below.								
Use it to confirm your ID with the Australian Taxiation Office. Option 2 - function use detection is verification, and I've provided my identification details for TWO of the following documents listed below. I also authorise Australian Super to disclose my name, residential address and date of birth to the credit reporting agency, lilion, for the sole purpose of vorifying my identity, by giving you my Medicare, driver's licence or Australian passport details below. I understand that lilion will confirm with australian Super whether my personal information (in whole or in party) matches their credit information file I also understand that they will not share any other information from my credit file with Australian Super. 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. Fill out any TWO of the following. 1. Full name as appears on my Medicare card My Medicare number is Valid to My reference number on this card is 2. Full name as appears on my driver incone Leanse number Card number is Wald to My reference number on this card is State of issue Evenry date Evenry date State of issue Family name at birth (not shown on your passport) Dy the state of the shown on your passport or give remained to the shown on your passport or government-issued proof of age card. Please note that each page of your photocopied documents must have been certified within the lest 6 months. For instructions on how to get your documents correctly certified photocopies of my original driver licence, passport or government-issued proof of age card. Rease note that each page of your photocopied documents must have been certified within the lest 6 months. For instructions on how to get your documents lead above. 4. Are you withdrawing your whole account balan	Option 1 - I authorise AustralianSuper to give my TFN (provided in Step 1) to my other super fund.							
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. 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. Fill out any TWO of the following. 1. Full name as appears on my Medicare card My Medicare number is	This option is only available if you're transferring funds across to another super fund, not an SMSF. Your other super fund will							
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information and a corresponding information match result will be provided via the use of third-party systems. Fill out any TWO of the following. Full name as appears on my Medicare card	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							
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My Medicare number is	Fill out any TWO of the following.							
2. Full name as appears on my driver licence Licence number Card number Card number I visit australiansuper.com/IDHelp to find the card number on your driver licence. Expiry date Expiry date Expiry date Expiry date Country of birth (not shown on your passport) Family name at birth (not shown on your passport) Family name at birth (not shown on your passport) See page 2 of this form for information about how to get your documents must have been certified 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, and I've provided my identification details for TWO of the documents listed above. 4. Are you withdrawing your whole account balance? Yes - This will close your account and any insurance cover will end. Investment returns², fees, tax and any insurance costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you complete this form. Do you have Member Direct investments? You should sell your Member Direct investments and close your Member Direct account for you, which will lead to a delay. You will incur additional costs if any term deposits are redeemed prior to their maturity date. Refer to the Member Direct investment and close your Member Direct for more information. Choose (X) one of the five options below: Transfer all of my account to an SMSF Withdraw \$ in cash from my account, and transfer the rest to an SMSF Withdraw all of my account to another super fund Withdraw 8 in cash from my account, and transfer the rest to an SMSF	1. Full name as appears on my Medicare card							
2. Full name as appears on my driver licence Licence number Card number! Visit australiansuper.com/IDHelp to find the card number on your driver licence. State of issue Expiry date Expiry date Expiry date Country of birth (not shown on your passport) Family name at birth (not shown on your passport) Family name at birth (not shown on your passport) Family name at birth (not shown on your passport) See page 2 of this form for information about 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, and I've provided my identification details for TWO of the documents listed above. 4 Are you withdrawing your whole account balance? Yes - This will close your account and any insurance cover will end. Investment returns², fees, tax and any insurance costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you complete this form. Do you have Member Direct investments? You should sell your Member Direct investments and close your Member Direct account before you lodge your request. Otherwise, well sell your Member Direct investments and close your Member Direct account for you, which will lead to a delay. You will incur additional costs if any term deposits are redeemed prior to their maturity date. Refer to the Member Direct investment and close your Member Direct for more information. Choose (X) one of the five options below: Transfer all of my account to an SMSF Transfer all of my account to another super fund Withdraw \$								
Licence number Card number Nisit australiansuper.com/IDHelp to find the card number on your driver licence. State of issue Expiry date Dom May Y Y Y Y 3. My Australian passport number is Place of birth (as shown on your passport) Country of birth (not shown on your passport) Pamily name at birth (not shown on your passport) Option 3 - I want to attach certified paper copies 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 also consent to using electronic verification if my paper documentation has been incorrectly certified or can't be read, and I've provided my identification details for TWO of the documents listed above. 4 Are you withdrawing your whole account balance? Yes - This will close your account and any insurance cover will end. Investment returns ² , fees, tax and any insurance costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you should sell your Member Direct investments? You should sell your Member Direct investments and close your Member Direct account before you lodge your request. Otherwise, well sell your Member Direct investments and close your Member Direct account for you, which will lead to a delay. You will incur additional costs if any term deposits are redeemed prior to their maturity dates. Refer to the Member Direct investment option guide available at australiansuper.com/MemberDirect for more information. Choose (X) one of the five options below: Transfer all of my account to another super fund Withdraw \$	My reference number							
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Withdraw all of my account in cash.	Transfer all of my account to another super fund							
	Withdraw all of my account in cash.							

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 $^{\rm 2}$ Investment returns can be positive or negative.

4 Are you withdrawing your whole a	ccount balance? (continued)
No - Choose (X) one of the three options below:	: (you need to leave at least \$6,000 in your account ³)
Transfer \$ f	rom my account to an SMSF
Transfer \$	rom my account to another super fund
	rom my account to another super fund
Withdraw \$,	from my account in cash. Any tax payable will be deducted from this amount.
³ You'll need to ensure you have enough funds to pay insurance c request if your account balance will fall below \$6,000. See the B	costs if you want to keep your insurance cover. AustralianSuper may also refuse all or part you Before applying for a payment section on page 2.
Choose the investment option(s) for	or your partial withdrawal payment
Write the percentage you want to withdraw from investment option below. If you leave this blank, y	
withdrawal will be made from your selected future contribution investment choice/s. If you don't hav	investments to make this withdrawal?
enough money in one or more of your selected op the balance of your withdrawal will be pro-rated in	
proportion to the balance in each option.	
High Growth	transfer to your other investment options prior to
Balanced	submitting this form.
Socially Aware	% No - You must maintain the minimum ongoing
Indexed Diversified	balance requirements as set out in the <i>Member</i> Direct investment option guide available at
Conservative Balanced	% australiansuper.com/MemberDirect to continue
Stable	using Member Direct.
Australian Shares	%
International Shares	%
Diversified Fixed Interest	<u> </u>
Cash	<u></u>
TOTAL MUST ADD UP TO 100% 1 0	0 %
6 Provide transfer and/or payment d	letails
	MSF, provide details below in section 6a the details.
SMSF name	Australian Business Number (ABN)
Electronic Service Address (ESA)	
SMSF bank details:	
Please attach a copy of an SMSF bank do number. The document must have been	ocument that clearly displays the SMSF account name, BSB and account issued within the last 12 months.
Account name	
BSB number Account number	
b) To transfer some or all of your account to your o	ther super fund, provide details below in section 6b.
Fund name	
Address	
Suburb	State Postcode
Australian Business Number (ABN) Unique S	
A LOCAL SHAFT DUSINGS TYATTOOL (A DIV)	545.4
Your other super fund member number	

6 Provide transfer and/or payment details (continued)
c) 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
7 Benefit payment checklist
Have you checked you are eligible for payment or rollover?
Have you completed Section 3 Provide proof of your identity?
Are you claiming a tax deduction for any personal contributions? If so, refer to page 2 for more information.
Are you transferring some or all of your benefit to an SMSF? If so, ensure Section 6a is completed and you've attached a copy of an SMSF bank document that clearly displays the SMSF account name, BSB and account number. The document must have been issued within the last 12 months.
Have you completed all the required sections and signed this form?
Have you considered where you want your <i>future</i> employer contributions paid? See further details below.
What happens to my future Employer contributions?
Using this form to transfer your benefits will not change the fund to which your employer pays your contributions, and may close the AustralianSuper account you are transferring your benefits from. If AustralianSuper receives future employer contributions after your benefits are transferred out and your account is closed, a new account will be opened for you in AustralianSuper. If you wish to change the fund into which your employer contributions are being paid, you will need to speak to your employer about super choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call the Australian Taxation Office (ATO) on 13 10 20.
8 Sign this form I have read the Privacy Collection Statement as set out on page 2 of this form, 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. If I am applying for a cash payment (full or partial), 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 AustralianSuper receives any contributions after my account has been closed a new account will be opened
for me. I understand that if I withdraw my whole account balance this will close my AustralianSuper account and any insurance cover will end. AustralianSuper will no longer have any responsibility for the account.
Sign here
Date D D M M Y Y Y Y
Print full name
9 Send this form to us
Please send the completed form and certified copies of your ID (if you haven't opted for electronic verification at Step 3) to AustralianSuper, GPO Box 1901 MELBOURNE VIC 3001. Or you can upload scanned copies of your completed form and certified identification at australiansuper.com/upload-document If you're withdrawing more than \$10,000, you'll also need to provide copies of bills or bank statements as listed on page 2 under 'How to certify your documents'.
National discours
Note to advisers: If you're submitting this form on behalf of a client, please avoid submitting multiple forms at the same time. Submit rollover or transfer-out forms individually to ensure efficient processing within 3 business days.