

How to apply

This form and information sheet will help you apply for the payment of your super benefit.

1 Check that you're eligible

You can apply to access your super benefit on 'compassionate grounds' if you need the money to pay for:

- medical expenses for you or your dependants
- partial payment of home loans to avoid foreclosure of the loan
- modification of a home or vehicle for you or your dependants suffering a severe disability
- the cost of palliative care for you or your dependants
- funeral costs for a dependant
- medical transport for you or your dependants.

If any of the circumstances listed above apply to you, you can apply to the Australian Taxation Office (ATO) for the release of your super benefit on compassionate grounds. If the ATO approves your application they will let you know via the MyGov portal and, you'll then need to apply to AustralianSuper. You can only apply for a payment on compassionate grounds if you are a citizen or permanent resident of Australia or New Zealand.

2 Apply to the ATO

Call the ATO on **13 28 61** to find out if you're eligible to request the early release of your super benefit on compassionate grounds.

Detailed information on how to apply is available on their website at ato.gov.au

They will need to know your account balance

When you apply for the release of your super benefit, the ATO will ask you how much money you currently have in your account.

To find out the balance of your super account, log into your account at australiansuper.com or call **1300 300 273**.



Release of your super

If you have an unrestricted non-preserved or restricted non-preserved benefit in your super, funds will generally be withdrawn from these components before your preserved benefit component.

3 Apply to AustralianSuper

If the ATO approves your application, please complete the attached form and return it to us together with:

- the original or a certified copy of the ATO approval letter, and
- certified proof of your identity (ID), or authority for us to verify your ID electronically by ticking 'I want to use electronic verification' on page 5 of the application form.

See the next page for how you can certify documents.

Send the documents to AustralianSuper

Because we need to see original signatures on both your form and certified ID (if you haven't given us permission to verify your identity electronically), you must send these documents to us – you cannot fax or email them.

Send your documents to:

AustralianSuper
GPO Box 1901
MELBOURNE VIC 3001

Once we receive your completed form and certified documents (if you haven't given us permission to verify your identity electronically), it will usually take around five business days to process your request.

If the payment reduces your account balance to less than \$10,000 it may affect your insurance cover. Refer to the *Insurance in your super* guide for details before deciding to request a payment.

! Claiming a tax deduction for personal super contributions

If you have made personal contributions during the year you might be able to claim a tax deduction. To claim a tax deduction for personal super contributions, you must send us a *Notice of intent to claim a tax deduction* form 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 benefit payment has been processed. To find out more about claiming a tax deduction for personal super contributions, see our *Tax and super* fact sheet at australiansuper.com/factsheets

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 show your current residential address and have the same name and 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 and 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.

Important notes

- 1. If you withdraw your full account balance and your employer is still contributing to your account, your existing account will be closed. You will then be set up with a new account and member number, with new default insurance cover. This cover may be less than you have now and different terms and conditions may apply.
- 2. If your existing account is closed and a new super account opened, any cover you apply for in addition to your default cover will be limited cover for at least two years and you may need to provide detailed health information.
- 3. Investment earnings, tax, insurance and management costs will change the final amount paid.

Please complete in pen using CAPITAL letters and print to mark boxes. You should read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

STEP 1. PROVIDE YOUR PERSONAL DETAILS

Last name

Mr Ms Mrs Miss Dr

First name

Date of birth

Male Female

D D M M Y Y Y Y

Tax File Number (TFN)

Member number



For how we use your TFN, go to australiansuper.com/RefTFN

Street address

Suburb

State

Postcode

Postal address (if different)

Suburb

State

Postcode

Telephone (business hours)

Telephone (after hours)

Mobile

STEP 2. PROVIDE PAYMENT DETAILS

Please 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 3. PROVIDE WITHDRAWAL DETAILS

Please select (x) one of the withdrawal options below:

- Total amount approved by the ATO: Now complete Step 4.
This option may close your account and any insurance cover you have will cease.
- My whole account, but keeping a \$10,000 account balance: Complete the section below to provide withdrawal details.
This option will keep your account open and any current insurance cover will remain active.
- A nominated amount below the amount approved by the ATO: Complete the section below to provide withdrawal details.
The nominated amount is \$, .00
*This option will keep your account open and any current insurance cover will remain active.
Additional payments will NOT be made at a later date.*

Which investment option/s should be used to fund the payment?

From your AustralianSuper PreMixed and DIY option/s
Write the percentage you want to withdraw from each investment option below. If you leave this blank, your withdrawal will be made equally across all your options.

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"/> %
Property	<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%	1 0 0 %

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, you must be eligible to redeem it before it matures and early redemption costs will apply. See *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 \$5,000 invested in the AustralianSuper PreMixed or DIY options after your withdrawal from these options has been made.

STEP 4. CONFIRM YOUR CERTIFIED APPROVAL LETTER

- I have attached the original or a certified copy of the ATO approval letter.

STEP 5. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the options below.

Option 1 – 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	Your reference number on this card is
<input type="text"/>	M M 2 0 Y Y	<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"/>	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 2 – 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 6. SIGN THIS FORM

The information provided on this form is correct and I authorise its use. I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information. 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 understand that a \$35 exit fee will be deducted from my super account for this payment.

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.

I understand that if I claimed a lesser amount than the ATO approved, no additional payments will be made at a later date.

Sign here:



Date

D	D	M	M	Y	Y	Y	Y
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Print full name

STEP 7. SEND THIS FORM TO US

Please send this form with your certified ATO approval letter and proof of ID, if you haven't opted for electronic ID verification to:

AustralianSuper, GPO Box 1901, MELBOURNE VIC 3001

We need your original form and certified documents so you can't fax or email them to us.