

# Super withdrawal/rollover form



Use this form if you have a Personal Retirement Plan or Tailored Super Plan account and you wish to:

- make a withdrawal from your account
- transfer your account to another provider.

Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. You can also type data directly into this form, print it and send it to us.

Refer to the notes section below for information on how to make changes to your account electronically using the secure client portal. If you have any questions, call us on 1800 620 305.

**i** If you are permanently incapacitated, terminally ill, applying under compassionate grounds or applying under severe financial hardship you may need to complete additional forms and provide medical evidence. Please call us on 1800 620 305 for more information.

## 1. Your details

Client ID

Account number

Date of birth

Title

Last name

Given name(s)

## 2. Your eligibility to access your super

You must meet one of these eligibility conditions before you can withdraw your benefits. You can skip this section if you are only transferring your benefits.

Please select (X) one of the following statements that best describes your current situation.

<input type="checkbox"/> I have left an employer since turning 60 I have ceased an employment arrangement on or after turning age 60.	<b>Date of birth</b>	<b>Preservation age</b>
	Before 1 July 1960	55
	1 July 1960 to 30 June 1961	56
<input type="checkbox"/> I plan to work less than 10 hours a week or not at all I am preservation age or over, have ceased a working arrangement in the past, and do not intend to work 10 hours or more a week.	1 July 1961 to 30 June 1962	57
	1 July 1962 to 30 June 1963	58
	1 July 1963 to 30 June 1964	59
<input type="checkbox"/> I am aged 65 year or over	On or after 1 July 1964	60
<input type="checkbox"/> The amount I am taking can be accessed with no restrictions The amount being withdrawn is already unrestricted non-preserved.		
<input type="checkbox"/> I am permanently incapacitated		
<input type="checkbox"/> I have a terminal medical condition and have 2 medical certificates (at least one from a specialist)		
<input type="checkbox"/> I am applying under an APRA-specified (compassionate) grounds		
<input type="checkbox"/> I am applying under the severe financial hardship basis (with Centrelink letter)		

## 3. Amount to be withdrawn/transferred

If you are withdrawing funds, please also complete Section 4. If you are transferring funds, please complete Section 5.

I would like to make a (please select (X) one only):

Full withdrawal or transfer

Partial withdrawal or transfer of \$  (whole numbers only)

If you have elected a partial withdrawal, please nominate if the payment you would like to receive will be:

After the deduction of any taxes and personal advice fees (net)

Deduct any taxes and personal advice fees from this amount and pay me the balance (gross)

**i** Please note, that you can only take your partial withdrawal as a lump sum withdrawal.

### 3. Amount to be withdrawn/transferred (continued)

**Withdrawal choice if you have more than one investment option**

If you invest in more than one investment option, you can choose how your withdrawal is deducted from the three options shown below. If you don't select an option, your withdrawal will be deducted as per your current withdrawal choice/profile. If you don't have a withdrawal choice/profile, your withdrawals will be deducted in the default order.

Please select (X) where you would like payments to be withdrawn from:

- Default order\* (see below)
- Percentage allocation – Complete column A
- Sell order – Complete column B and please number all boxes in the order you would like them to be sold down.

Fund name	Percentage allocation Column A	OR	Sell order Column B
<b>Diversified investment options</b>			
High Growth	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Growth	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Socially Conscious	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Balanced Growth	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Conservative	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Defensive	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
<b>Single asset class investment options</b>			
Australian Equities	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
International Equities	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Property	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Fixed Interest	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
Cash	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		<input style="width: 20px; height: 20px;" type="text"/>
<b>Total (must add to 100%)</b>	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> %		

**OR**

Specify the amounts that you wish to redeem from each investment option.

Fund name	Amount	All
<b>Diversified investment options</b>		
High Growth	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Growth	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Socially Conscious	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Balanced Growth	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Conservative	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Defensive	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
<b>Single asset class investment options</b>		
Australian Equities	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
International Equities	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Property	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Fixed Interest	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Cash	\$ <input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
<b>Total</b>	\$ <input style="width: 150px; height: 25px;" type="text"/>	





## Proof of identity

We require a certified copy of your proof of identity (POI) documents. If you have already provided a certified copy of your POI document(s), you do not have to provide it again, as long as you are not changing your name, providing bank details for the first time or changing a previously nominated bank account.

If you have already provided certified copies of your POI documents but either your name or the bank account you are paid into has changed must provide evidence of the change(s) as follows:

### Change of name

If you have changed your name, you must provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificates cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your original maiden name and your married name.

### Change of bank account details

If you have changed the bank account for which you would like to be paid into, you must provide a certified copy of a proof of identity document. Alternatively, you may change your bank account details via our client portal.

### Acceptable documents and certification

Providing certified proof of your identity is a three-step process:

#### 1 Collect your originals

Collect your proof of identity document(s). We have listed the documents you can use below.

#### 2 Photocopy your originals

#### 3 Have your copies certified

Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

#### Either:

A certified copy of one of the following documents:

- A current Australian state/territory driver's licence containing your photograph
- An Australian passport
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier\*
- A current driver's licence issued under the authority of a foreign country containing your photograph

#### Or:

One certified document from this list:

- An Australian birth certificate or extract issued by a state or territory
- A citizenship certificate issued by the Commonwealth
- A current Centrelink pension card that entitles you to receive financial benefits
- A citizenship certificate issued by a foreign government
- A birth certificate issued by a foreign government, the United Nations or an agency of the United Nations

AND One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- For a person aged under 18, a letter from a school principal issued in the past three months that details the person's name, residential address and when they attended the school, or a student card if available

\* If the document and/or the certification is not in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI).

## Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "I certify that this document is a true copy of the original", followed by their signature, printed name, address, qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date.

### If you are in Australia


The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at [www.ag.gov.au](http://www.ag.gov.au).

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- Financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

Samantha Sample has provided a copy of her identification that includes her signature, full name, date of birth and current residential address.

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



"I certify that this document is a true copy of the original."

*K Anderson*

Name: Kate Anderson  
Address: 6 Some St, Suburb NSW 2000  
Qualification: JP  
Registration no: 123456  
Date: 11 October 2021

**i** If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

### If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

## Electronic submission of changes via secure client portal

Changes to your account can be submitted electronically only via the secure client portal. To register for the portal go to [retire.aware.com.au/registration](http://retire.aware.com.au/registration)

If the change to your investments is submitted electronically before 3.00pm Sydney time on any business day, it will be processed using the unit price applicable for that day. This price is not known until the next business day. It is important to consider this when making your transaction request.

If the change to your investments is submitted electronically after 3.00pm Sydney time on a business day, or on a non-business day, we treat it as having been received before 3.00pm Sydney time on the next occurring business day and it will be processed using the unit price applicable for that next occurring business day.