

Benefit payment request

Important information

Please note: Failure to provide any of the requested information may result in delays in processing your benefit payment. You will receive the applicable withdrawal unit price once all completed information is received at our principal office of administration.

Things you should consider before withdrawing your benefit

Before deciding to withdraw your benefit, we recommend you carefully consider your current benefits such as available investment options and fees and the effect that any transfer or cashing of your benefit may have upon these. Depending on your circumstances, cashing in your benefit may have tax and social security implications. Before making a decision to withdraw your benefits, we recommend you speak to a financial adviser. You should seek advice from your taxation adviser in relation to taxation matters. If you would like more information about your benefit simply call us.

1. Personal details

(All fields must be completed)

Account number

(If changing your name and/or address, please write your name and/or address that was last notified.)

Title Date of birth

Given name(s)

Surname

Residential address

Suburb State Postcode

Country

Postal address

Suburb State Postcode

Country

1. Personal details (continued)

Mobile number Alternate phone number

Email address

2. Request to transfer to another superannuation account or income stream

Please note: If you are rolling over to a Self-Managed Superannuation Fund (SMSF) please include your SMSF bank account details in **section 4** below.

Full name of new fund

New fund contact

Fund contact phone number

New fund ABN

New fund Unique Superannuation Identifier (USI)

New fund account/policy number

3. Cash payment

! Please note: The minimum cash amount that can be partially withdrawn is \$2,000, subject to \$2,000 remaining in your account after the withdrawal.

- Full withdrawal of benefit (to nominate where to have your benefit paid, please also complete **section 4**). For full withdrawals, we will pay your minimum pension amount for the relevant portion of that financial year before the withdrawal is processed.
- Partial withdrawal of benefit (please specify amount below and to nominate where to have your benefit paid along with which investment options to withdraw from, also complete **sections 4 and 6**).

For partial withdrawals, the amount specified below is to be gross of tax.

\$

4. Payment direction details

(Please complete all details of your nominated Australian bank, building society or credit union account.)

Account name

BSB number Account number

! Please note: Benefit payments will only be made directly to you, or if you are rolling over to a SMSF, to the SMSF bank account. Payment cannot be made to a third party.

5. Payment direction details

Please cross one or more of the reasons below:

- Consolidating my super/pension accounts
- Transferring to another investment vehicle
- Seeking different investment options
- Received financial advice
- Moving to a super/pension product with a different fee structure
- Need to access additional funds

6. Nomination of investment options for partial withdrawals

Only complete this section if you have requested a partial withdrawal.

How to complete this section:

Nominating a percentage (%) amount: Please nominate the % amount you would like withdrawn from each investment option(s). If you would like to withdraw your total holding in an investment option, please write 100% or "ALL". If you nominate a percentage amount of less than 100%, we will only withdraw that percentage of the investment option, e.g. if you have \$20,000 in the investment option and specify 50%, we will withdraw \$10,000 from that investment option.

Nominating a dollar (\$) amount: Please nominate the exact \$ amount you would like withdrawn from each investment option(s). Please ensure the amounts specified for each investment option(s) equal the total amount requested at **section 3**.

Strategy

Investment option	Code	Investments (dollar (\$) or percentage (%))
Aggressive		
Multi-Manager Australian Share	AS	
Multi-Manager Global Share	JP	
Growth		
High Growth	AG	
Moderate		
Growth	Q3	
Conservative		
Balanced	AB	
Capital Stable	BU	
Defensive		
Capital Defensive	JE	
Capital Secure	F3	
Savings	U3	
Total		\$ / %

Where not otherwise indicated, the withdrawal amount will be apportioned across your investment options.

7. Identification requirements

What the certifier needs to do to certify your photocopied ID

The certifier can certify the photocopy of your ID by placing a stamp or writing 'This is a true and correct copy of the original' followed by their signature, printed name, qualification and the date. For example:

Persons who can certify documents

A person who is currently licensed or registered under a law to practise in one of the following occupations:

- Chiropractor
- Dentist
- Legal practitioner
- Medical practitioner
- Nurse
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trademarks attorney
- Veterinary surgeon.



This is a true and correct copy of the original.

JOHN CLARKE - Justice of the Peace - 01.08.19

A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described) or a person who is in the following list:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- An officer with, or a credit representative of, a holder of an Australian Credit Licence (ACL), having two or more years of continuous service with one or more licensees
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years of continuous service with one or more licensees

- Australian Consular Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Consul-General
 - b. Consul
 - c. Vice-Consul
 - d. Trade Representative
 - e. Consular Agent
- Australian Diplomatic Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Ambassador
 - b. High Commissioner
 - c. Minister
 - d. Head of a Mission
 - e. Commissioner
 - f. Charge d'Affaires
 - g. Counsellor, Secretary or Attache at an Embassy, High Commissioner's office, Legation or similar
- Bailiff
- Bank officer with two or more continuous years of service
- Building society officer with two or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with two or more years of continuous service
- Employee of the Australian Trade and Investments Commission who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place
- Employee of the Commonwealth who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (c) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with two or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961

7. Identification requirements (continued)

- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Australian Defence Force who is:
 - a. an officer or
 - b. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or
 - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - a. the Parliament of the Commonwealth or
 - b. the Parliament of a State or
 - c. a Territory legislature or
 - d. a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of:
 - a. the Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority or
 - c. a local government authority or
 - d. With two or more years of continuous service and the person is not already specified in another item on this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - a. The Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution.

8. Tax File Number (TFN) requirements

Please note that it is not an offence not to quote your TFN. Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect, use and disclose your TFN. We may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing that we are not authorised to do so.

It is not an offence to choose not to quote your TFN. However, giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all the types of contributions that are able to be made to your account(s)
- other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

If you have not previously provided us with your TFN and wish to do so now, please cross the box below and quote your TFN:

Yes, I agree to provide my TFN which is

If you are rolling over, please cross the box below if you do not want us to pass on your TFN to your nominated superannuation fund or retirement savings account provider:

I do not want to pass on my TFN

9. Declaration and acknowledgement

By signing this form I declare as follows:

- I understand that any payment from the Fund will be after the deduction of any taxes (including applicable levies and charges) paid or payable by me in respect of the withdrawn benefits.
- I acknowledge that payment of the benefits requested in accordance with this form will constitute a complete discharge to the Trustee in respect of the withdrawn benefits.
- I acknowledge that I have read and understood the Tax File Number notification requirements section of this form.
- If this form is signed under Power of Attorney, the Attorney hereby certifies that he/she has not received notice of revocation of that Power.
- I am aware I may ask the Trustee of my new fund for information about fees or charges that may apply, or any other information about the effect this payment/rollover may have on my benefits, and I have obtained or do not require any further information.

Member's signature



Date

D	D	M	M	Y	Y	Y	Y
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Where to send this form

This form must be mailed to:

Resolution Life
Locked Bag 5075
Parramatta NSW 2124

Contact phone number
133 731
between 9 am and 5 pm (AEST/AEDT), Monday to Friday,
excluding public holidays.

What you need to know

Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL No. 229757, RSE Licence No. L0001458 (Trustee) as trustee of the Super Retirement Fund ABN 40 328 908 469 (Fund) is the issuer of PensionSelect.

Resolution Life Australasia Limited ABN 84 079 300 379 (Resolution Life) is the administrator of the Fund on behalf of the Trustee.

The information contained in this letter is factual information only. It does not contain any financial product advice or make any recommendations about a financial product or service being right for you.

Resolution Life is part of the Resolution Life Group and can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.