

# Withdraw or transfer your income stream

You should use this form if you wish to make a **lump sum withdrawal** from your First State Super income stream or **transfer** your First State Super income stream to another income stream provider.

Proof of identity must be submitted with all requests for withdrawals from either your transition to retirement income stream or retirement income stream **unless you provided satisfactory proof of identity when you first applied for your income stream** (see **Section 5 Proof of identity**). Cheque payments are not available.

Generally, you cannot make lump sum withdrawals from your First State Super transition to retirement income stream unless you have satisfied a condition of release, or the resulting lump sum is to pay surcharge or a Family Law benefit. However, you can commute a transition to retirement income stream in order to transfer the lump sum to another superannuation product.

## Irregular income stream payment or lump sum withdrawal

A withdrawal from your retirement income stream may be treated as:

- an irregular income stream payment, or
- a lump sum withdrawal, or
- a combination of income stream payment and lump sum.

For more information, please refer to the section on taxation in the current Product Disclosure Statement, or the fact sheet on superannuation income streams on our website.

**Please print clearly in black ink.**

## 1. Your personal details

Member number	Title (Mr Mrs Ms Miss Dr)	Male	Female	Birth date	(DD-MM-YYYY)
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Family name					
<input type="text"/>					
Given name/s					
<input type="text"/>					
Residential address					
<input type="text"/>					
Suburb				State	
<input type="text"/>				<input type="text"/>	
Postal address (if different from residential address)					
<input type="text"/>					
Suburb				State	
<input type="text"/>				<input type="text"/>	
Work or Home	Daytime contact telephone number			Mobile number	
<input type="checkbox"/>	<input type="text"/>			<input type="text"/>	
Email address					
<input type="text"/>					

Please cross  one box only:

- I am currently receiving a **transition to retirement** income stream
- I am currently receiving a **retirement** income stream



## 4. Payment details (cont.)

**4b**  Please transfer the amount requested from my retirement income stream to the fund shown below. (You must also satisfy the proof of identity requirements outlined in Section 5.)

**The fields below marked \* are mandatory fields. Please note that if you do not complete all the mandatory fields there will be a delay in processing your transfer request.**

Name of rollover fund\*

Cheque payee (if different from rollover fund name)

Postal address

Suburb

State

Postcode

Superannuation Product Identification Number (SPIN)

Member number (in this fund)\*

Fund phone number\*

Fund ABN number\*

You must check with your chosen rollover fund to ensure that they can accept this transfer. If you wish to roll over to more than one fund, you must provide individual details for each rollover. Please copy this page and complete the details for each rollover.

Please note that if you are transferring to a self-managed superannuation fund that is not registered with the Australian Taxation Office as a complying superannuation fund, you must also supply certified copies of the following documents in order to show that you are a member or a trustee of that self-managed superannuation fund:

- the Australian Taxation Office "New Trustee Letter" **OR**
- the Funds most recent Annual Return lodged with the ATO.

## 5. Proof of identity

In order to protect your benefit entitlement and to ensure your privacy is maintained, we require you to provide **certified documentation** verifying your identity before your benefit payment request can be processed, unless you provided satisfactory proof of identity when you first applied for your income stream. **(See below for a list of people who are authorised to certify documents.)**

### Complete either Part A or Part B

(Note: Part B should only be completed if you do not have a document from Part A)

#### Part A – Acceptable primary ID documents

Select ONE valid document from this section (Please cross  the document you are providing):

- Current Australian State/Territory driver's licence containing a photograph of the person
- Australian Passport (a passport that has expired within the preceding two years is acceptable)
- Card Issued under a State or Territory for the purpose of providing a person's age containing a photograph of the person
- Foreign passport or similar travel document containing a photograph and the signature of the person\*

**OR**

#### Part B – Acceptable secondary ID documents

Select ONE valid document from this section (Please cross  the document you are providing):

- Australian Birth Certificate
- Australian citizenship certificate
- National identity card issued by a foreign government containing a photograph of the person in whose name the card was issued\*

**AND**

## 5. Proof of Identity (cont.)

**ONE** valid option from this section (Please cross  the document you are providing):

- A document issued by the Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to the individual and which contains the individual's name and residential address
- A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by the individual to the Commonwealth (or by the Commonwealth to the individual) which contains the individual's name and residential address
- A document issued by a local government body or utilities provider within the preceding 3 months which records the provision of services to that address or to that person (the document must contain the individual's name and residential address)
- Foreign driver's licence that contains a photograph of the person in whose name it was issued and the individual's date of birth\*
- Pension card issued by Centrelink
- Health card issued by Centrelink

\* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

### Have you changed your name, or are you signing on behalf of the applicant?

If you have changed your name or are signing on behalf of the applicant, you will need to provide one of the following certified documents:

- If you have changed your name – Marriage certificate, deed poll or change of name certificate from Births, Deaths and Marriages Registration Office.
- If you are signing on behalf of the applicant – Guardianship papers or Power of Attorney.

**IMPORTANT:** All copied pages of ORIGINAL proof of identity documents must be certified as true copies by an individual approved to do so as per the following list.

### Certification of personal documents

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (eg. Justice of the Peace, Australia Post employee, etc) and the date.

The following people can certify copies of the originals as true and correct copies:

- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate
- a registrar or deputy registrar of a court
- a Chief Executive Officer of a Commonwealth court
- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer.

## 6. Declaration

- I declare that I am the person named on this form.
- I request payment to be made in the manner indicated on this form.
- I declare the information given on this form is true and correct.
- I understand that any taxation liability will be deducted at the time of payment.
- I understand that a \$36 exit fee will be applied to my payment (with the exception of Family Law payments or transfers from my transition to retirement income stream to a retirement income stream).
- I understand that the *First State Super Superannuation Income Streams Product Disclosure Statement (PDS)* contains important information about my options and choices.
- I acknowledge that I have read the current PDS and understand the implications of the choices I have made on this form.
- I understand that First State Super can provide me with information but does not provide investment advice, and that independent financial advice may assist me if I have any questions about the information provided by First State Super.

Signature

Date

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First State Super PO Box 1229 WOLLONGONG NSW 2500

If you have any enquiries please call Customer Service on **1300 650 873** between 8:30 am and 5:30 pm AEST from Monday to Friday for the cost of a local call (unless calling from a mobile or pay phone).

## Privacy notice

The information you provide in this form is collected by and held for First State Super by the fund administrator, Pillar Administration, in accordance with the National Privacy Principles of the *Commonwealth Privacy Act*. For further information about privacy, please phone Customer Service on 1300 650 873 or visit [www.firststatesuper.com.au](http://www.firststatesuper.com.au) to view the Privacy Policy.