



Application by associate for preserved benefit after reaching age 55

Important information about this form

Who should use this form?

Use this form if you:

- are an Associate of MilitarySuper
and
- have an Associate A and/or Associate B benefit
and
- have reached age 55
and
- wish to withdraw your preserved benefit from MilitarySuper.

If you're between age 55 and your preservation age, your associate B benefit can only be rolled over to another eligible super fund. Your preservation age is determined by your date of birth, according to the table below.

Date of Birth	Preservation age
Before 1/7/1960	55 years
1/7/1960 – 30/6/1961	56 years
1/7/1961 – 30/6/1962	57 years
1/7/1962 – 30/6/1963	58 years
1/7/1963 – 30/6/1964	59 years
After 30/6/1964	60 years

After completing this form, please forward it to MilitarySuper at the address shown in **Part K** on page 9 of this form.



Military
Superannuation &
Benefits Scheme

➔ About this form continued on next page

Associate A & Associate B benefits

Your benefit may consist of one or both of the following:

Associate A benefit – is a taxed benefit that is held for a person as units in one or more Investment Divisions in MilitarySuper.

Associate B benefit – is an untaxed benefit that is indexed annually at the long term bond rate.

Rollover fund nominations

If you are choosing to rollover part of your benefit, it must be paid to a complying superannuation fund, rollover fund, Retirement Savings Account (RSA). We will not deduct tax from any amount rolled over to another fund however, the receiving fund will deduct 15% tax from any untaxed component of the rollover.

You can nominate two rollover funds or RSAs to receive all or part of your lump sum benefit. Complete one nomination if you are going to roll over your entire benefit to one fund. If you are going to split the amount, complete both nominations with details of the second fund.

We will make all rollover payments directly to your nominated rollover fund(s). Please make sure you have the correct postal address of your fund(s).

When completing this section you must include the name and Australian Business Number (ABN) for the nominated rollover fund or RSA. If you have a membership number (known as your member client identifier) and Unique Superannuation Identifier (USI) for the rollover fund or RSA, please include these numbers. If you do not have them, you can get these details from the rollover fund or RSA. If you don't include these details, it will result in payment delays of your benefit. Please ensure your nominated rollover account(s) is active and can receive deposits from other superannuation funds. Failure to do so will result in the payment being returned to our office.

Payment

Lump sums and rollovers are normally paid within 15 working days after the date we receive all necessary documentation to enable us to process your application.

For more information

If you wish, you can seek further information on your options and completion of this form from MilitarySuper on **1300 006 727**.

You can also read the **MilitarySuper Product Disclosure Statement (PDS)** available on our website **csc.gov.au**.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this ☐ with a ✓ or ✗ then fill out the next question or section.

Submitting your form

Send the application and declaration to:

MilitarySuper
GPO Box 2252
Canberra ACT 2601
Australia



Application by associate for preserved benefit after reaching age 55

Form start

Read each section of the form carefully before filling it in.

A

About yourself

1.	Service number/Employee ID	<input type="text"/>
2.	Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="text"/>
	Surname	<input type="text"/>
	Given name(s)	<input type="text"/> <input type="text"/>
3.	Former surname (if applicable)	<input type="text"/>
4.	Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
5.	Address	<p>POSTAL ADDRESS</p> <input type="text"/> <input type="text"/> <p>SUBURB STATE POSTCODE</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <p>RESIDENTIAL ADDRESS</p> <input type="text"/> <input type="text"/> <p>SUBURB STATE POSTCODE</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>



Military
Superannuation &
Benefits Scheme

➔ Section A continued on next page

6. Contact details

BUSINESS HOURS

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AFTER HOURS

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MOBILE NUMBER

--	--	--	--	--	--	--	--	--	--

EMAIL ADDRESS

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@																			
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- ☐ If you provide your email address, we will provide your pension advice letter and Payment Summary electronically via Pensioner Services Online and notify you by email of when they are available. Please tick this box if you want paper copies of those documents to be sent to the postal address above instead. You can change your communication preference at any time via Pensioner Services Online.

B Employment Declaration/Age

7. I have attained age 65

- ☐ No
☐ Yes Go to **Part C**

8. If you are less than 60, do you intend to engage in any gainful employment of 10 hours or more per week?

- ☐ No
☐ Yes – You are regarded as not having retired from the workforce. Any Associate A and Associate B benefits must be left preserved in MilitarySuper or rolled over to another regulated superannuation fund.

C Preserved Associate A benefit options

Do not complete this Part if you have rolled over your Associate A benefit previously.

9. Please choose your option for your Associate A benefit (one only).

- ☐ **Option 1**
Take a **lump sum** Provide details in **Part F**
☐ **Option 2**
Rollover to another fund Provide details in **Part E**

D Preserved Associate B benefit options

10. Please choose your option for your Associate B benefit (one only).

- ☐ **Option 1**
Take a **lump sum** Provide details in **Part F**
☐ **Option 2**
Rollover to another fund Provide details in **Part E**

E

11.

Payments will be made directly to the nominated rollover fund(s). A copy of the Rollover Benefits Statement will also be included with your benefit payment letter and sent to your nominated address.

Write the amount for each institution, except write 'BALANCE' for the last (or only) fund.



Important: Please ensure your nominated rollover account(s) is active and able to receive deposits from other superannuation funds. Failure to do so will result in the payment being returned to our office.

Name of rollover fund

[illegible]

Postal address of fund

[illegible][illegible]

Fund Identification No.

[illegible]

Australian Business No. (ABN)
of rollover fund

[illegible]

Unique Superannuation Identifier (USI)

[illegible]

Membership No.
(known as your member
client identifier) for fund

[illegible]

Dollar amount

\$									
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If you would like to roll over your benefit to more than one fund, please attach the same details as above for the second fund.

F

12

☐ Savings bank ☐ Building Society ☐ Trading bank ☐ Credit Union

Name of institution

[illegible]

Branch location

[illegible]

Branch (BSB) number

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Account number

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Account held in
name(s) of (must
include your name)

[illegible]



Identification requirements

13. To confirm your identity, we require some information from you—this is to protect your benefit against fraud, money laundering and terrorism financing, under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

Verifying your documents

Identifying documents may be verified through the Document Verification Service (DVS). DVS is a national online system that allows approved government agencies and organisations to compare a member's identifying information with a government record. It is not a database and does not store any personal information. Requests to verify a document are encrypted and sent via a secure communications pathway to the document issuing authority for checking.

If you don't provide authorisation to have documents verified electronically or your documents are incompatible with DVS, you will need to provide certified copies of required documents. Please also refer to the section *Certifying your documents*.

An electronic copy of your identification documents will be stored in a secure environment and hard copies will be securely stored off-site. All copies will only be used for the purpose of confirming your identity. You need to send in identification with every application.

DVS is only compatible with some identification documents, these have been listed below.

Certifying your documents

If you're providing certified documents, the certifying authority must confirm in writing you are the valid holder of the identification you are presenting, and any copies are true copies of the original.



IMPORTANT: The certification must include the name, signature, qualification and registration number of the certifying authority (if applicable), and the date of the certification.

The following sample of certifying authorities can certify your documents in Australia:

- Dentist
- Employee of a Commonwealth authority engaged on a permanent basis with five or more years of continuous service who is not specified elsewhere in this document
- Financial Adviser or Financial Planner
- Justice of the Peace (JP)
- Legal Practitioner
- Medical Practitioner
- Member of the Australian Defence Force who is:
 - an Officer; or
 - a Non-Commissioned Officer within the meaning of the *Defence Force Discipline Act 1982* with five or more years of continuous service; or
 - a Warrant Officer within the meaning of that Act.
- Midwife
- Notary Public
- Nurse
- Occupational therapist
- Physiotherapist
- Psychologist.

For a full list of certifying authorities refer to **Schedule 2** of the *Statutory Declarations Regulations 2018* available at www.legislation.gov.au/Details/F2018L01296

Please note:
We require a copy of both sides of your identification document.

How can I meet the identification requirements?

You only need to provide **one** document from the **Primary photographic identification** category. If you can't provide any **Primary photographic identification** you will need to provide **one** secondary identification document from List A AND **one** secondary identification document from List B. We can only accept documents that are listed below for identification purposes.

If the name we hold on file for you is different to the name on your identification, or two pieces of identification are in different names, please provide a certified copy of your **Marriage** or **Change of Name certification**.



If you would like us to use DVS to verify your identification, please provide authorisation by placing a check in the box below.



☐




I confirm that I am authorised to provide the personal details presented and I consent to the information being checked with the document issuer or official record holder via third party systems for the purposes of confirming my identity.



You must provide a copy* of one of the following:

Primary photographic identification

DVS compatibility is shown as  or 




-  A current Australian Driver's Licence (front and back of licence must be provided).
-  A current Australian Passport (or one which has expired within the last two years).
-  A current Australian Proof of Age card (issued under a State or Territory law).

If your documents are incompatible with DVS, don't forget to provide certified copies.




Secondary identification requirements

Only provide these documents if you're unable to provide **one** of the **Primary photographic identification** documents.

List A

-  Your Australian Birth Certificate or extract issued by a State or Territory.
Please note: Birth Certificate extracts and Birth Certificates issued before 1970 may not be verified by DVS.
-  Your Citizenship Certificate issued by the Commonwealth.
-  Your current Pensioner Concession Card issued by the Department of Human Services.

List B

-  Your notice issued by the Australian Taxation Office (ATO) within the last 12 months that shows your name, current residential address, and records an amount payable either to or from the ATO.
-  Your notice issued by a local council or utilities provider in the last three months showing the provision of services and current residential address. **For example:** rates notice, electricity or water bill.
-  Your 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 a financial benefit. **For example:** a Centrelink letter.

Certifying your documents overseas

If you live overseas and need to have documents certified, it needs to be done by a person in a foreign country who is authorised by law in that jurisdiction to administer oaths or affirmations or to authenticate documents. For more information refer to ag.gov.au and dfat.gov.au. Documents provided in a foreign language must be accompanied by a certified translation completed by an accredited translator.

Persons residing overseas and foreign residents may need to contact us.

***Don't send original documents.**



Tax File Number

14. Under the *Superannuation Industry (Supervision) Act 1993*, we are authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. We may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing that your TFN not be disclosed to any other superannuation provider.

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

- We will be able to accept all types of contributions (subject to scheme rules).
- The tax on contributions to your superannuation account/s will not increase.
- Other than the tax that may ordinarily apply, no additional tax will be deducted 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 already provided your TFN to MilitarySuper, you are under no obligation to provide it again in this application.

Your Tax File Number

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Your Tax File Number remains confidential.

- ☐ Please check this box if you do not want MilitarySuper to give your TFN to the Rollover Fund(s)/RSA(s) nominated above.

We are required to validate your Tax File Number (TFN) with the ATO's records to confirm the TFN provided is yours and is correct. Your TFN can be validated using the SuperTICK validation service at any time during your MilitarySuper membership and must be validated before your benefit can be rolled over to another fund. If you do not provide your TFN, the processing of your benefit payment may be delayed.



Declaration

15. I declare that:
- The information I have provided is true and correct to the best of my knowledge. I acknowledge that it may be a criminal offence to knowingly provide false or misleading information or documents.
 - I have read the PDS and I understand the options available for my benefit entitlement.
 - I have read and understood the information set out in **Part H** – I understand that supplying my TFN is optional and that if I have not provided my TFN, tax will be deducted at the highest marginal tax rate.
 - The TFN I have provided is the same number advised to me by the Australian Taxation Office.

I understand that if I have not completed all the required information, this application may be returned to me for completion and payment may be delayed.



Sign

SIGNATURE									

Date signed

D	D			/	M	M			/	Y	Y	Y	Y



Privacy

16. ☐ I do not want my contact details passed to an independent firm commissioned for the purpose of participating in research on the service provided by MilitarySuper.

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via csc.gov.au or by contacting us on **1300 006 727**, for the purpose of managing your super. This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.



Lodgement

You have now completed this form.

17. Send the application and declaration to:

MilitarySuper
GPO Box 2252
Canberra ACT 2601
Australia



Need assistance?
Call us on the phone
numbers below



Email
members@enq.militarysuper.gov.au



Phone
1300 006 727



Fax
(02) 6275 7010



Post
MilitarySuper
GPO Box 2252
Canberra ACT 2601



Web
csc.gov.au



Overseas Callers
+61 2 6192 9502