

PSSap: Withdrawing your super

Important information about this form

What this form is for

- Use this form to withdraw part or all of your benefit or transfer it to another super fund.
- For more information refer to the <u>Withdrawing your super</u> factsheet and the <u>PSSap Product Disclosure Statement (PDS)</u>.

What you need to know

- To apply for an early release payment under financial hardship or specified compassionate grounds, do not use this form, go to <u>csc.gov.au</u> and complete the <u>Early access to superannuation benefit</u> form.
- If you are seeking a withdrawal due to permanent disability or permanent incapacity, it will be taken as an application by you, the customer, for an Invalidity Retirement Certificate (IRC) to be issued.
- Please note that if you have an <u>unrestricted non-preserved component</u>, you can withdraw this without meeting a condition of release.
- Proportioning rules require your <u>taxable and tax-free components</u> to be spread in equal proportions across your benefit payment.
- You can check your Benefit Estimate (including whether you have an unrestricted non-preserved component) through the <u>CSC Navigator</u> available at <u>csc.gov.au</u>
- You should fully consider the fees and other costs that may apply before taking action.
 More information on fees and other costs related to your PSSap account is available in the <u>PSSap PDS</u> at <u>csc.gov.au</u>
- Any insurance cover you hold through lifePLUS cover will stop if you withdraw all of your PSSap benefit, or transfer all of your benefit to another super fund. More information on lifePLUS cover is available in the <u>Insurance and your PSSap Super</u> booklet at <u>csc.gov.au</u>
- If you withdraw all of your PSSap benefit resulting in your account being closed, and you are within
 the period of receiving Income Protection payments, you will need to let the insurer know your new
 superannuation fund and account number to ensure you continue to receive the superannuation
 contribution component.
- If you need assistance, please call us on 1300 725 171.

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

If you wish to make a cash withdrawal from your PSSap account, or you haven't provided a valid TFN, you'll also need to provide identification as part of the withdrawal process (Section E). If you are transferring your PSSap benefit to another Super Fund (other than an SMSF) and you've provided a valid TFN, you don't need to provide identification.

If you wish to verify your identification electronically, please email this form and a copy of one of the listed ID requirements in <u>Section E</u> to: <u>formsandapplications@pssap.com.au</u>

Or,

If you do not wish to verify your identification electronically, please send your completed form and your <u>certified proof of identity documents</u> to:

PSSap

Locked Bag 20117, Melbourne VIC 3001

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Privacy

We're committed to protecting your privacy. We collect your personal information for the purposes of providing superannuation services to you, improving our products and to keep you informed. We will only share your personal information where necessary for providing superannuation services to you. This may include disclosing your personal information to our scheme administrator, service providers or government or regulatory bodies. Your personal information may be accessed overseas by our service providers. Please see our privacy policy for full details. Your personal information will not be otherwise used or disclosed unless required or permitted under law. A full copy of our privacy policy as well as the privacy complaint process is available at csc.gov.au



Provide your personal details

PSSap membership no.											J									
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Given name(s)																				
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the CSC Navigator or under the Your details section of your Member Statement

PSSap is authorised to collect and validate your Tax File Number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. To improve the electronic transfer of funds between superannuation providers, PSSap is required to validate your TFN with the Australian Taxation Office (ATO). In the event that your TFN cannot be validated, or you do not wish to provide your TFN, you will be required to provide identification in accordance with **Section E**.





Confirm the amount of your withdrawal and that you meet eligibility requirements

Amount	
Amount	Part of my benefit for the amount of
(You must leave	\$ net
at least \$6,000 in your account)	OR
	All of my benefit and close my account
	AND
Date your employment ceased/will cease	D D M M Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y
Date of last contribution to PSSap	
	Wait for my final employer contribution
withdrawal. If we recand you will have to money. If we receive	vise us to wait for your final employer contribution we will proceed with the seive another contribution from your employer, we will open a new account complete a new Withdrawing your super form if you want to withdraw this another contribution from a non-participating employer, we will reject the urn it to your employer.
Withdrawal Eligibilit	у
Confirm which one o	f the following withdrawal eligibility requirements apply to you:
	I wish to transfer my PSSap benefit to another superannuation fund. Ensure you complete Section D. Note: This form cannot be used to transfer to an SMSF. For an SMSF transfer please use the Transfer to a self-managed super fund form.
	I have reached age 60, I have retired and to the best of my knowledge I will not resume gainful employment. Please complete the Date your employment ceased/will cease section above.
	I have ceased gainful employment with an employer after turning 60. Please complete the Date your employment ceased/will cease section above.
	I am over age 65.
	I am retiring due to permanent disability or permanent invalidity.
	Please contact us on 1300 725 171 to discuss additional requirements.
	I have a terminal medical condition. Further evidence may be required, please call us on 1300 725 171 to discuss.
	I have changed jobs and my PSSap account balance is \$200 or less.
	I have an <u>unrestricted non preserved component</u> .
	I am a temporary resident permanently leaving Australia (except New Zealand citizens). This is known as a Departing Australia Superannuation Payment (DASP). To apply for a DASP you'll need to use the <u>ATO website</u> .
	I am moving to New Zealand indefinitely and wish to transfer to a <u>New Zealand KiwiSaver Scheme</u> Please contact us on 1300 725 171 to discuss additional requirements.

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I would like my with	drawal paid	in the	follov	ving	way																		
	Electronic withdrawal – go to Section C and provide certified identification documents in accordance with Section E																						
	Transfer to another fund(s) only – complete Section D A transfer to another fund and an electronic withdrawal – provide																						
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	\$										Paid as o anot							rans	er				
	OR																						
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payable	e to y	OL	I																				
Deposit my superannuation benefit into the following bank account:																							
Name of account hol	lder																						
Branch (BSB) numbe	er			-																			
Account number																							
Note: your superanr Australian financial i on the account deta	institution w	ith a B																					
Provide certified	d identificati	on do	cumei	nts ir	n acc	orda	ance	wit	h Se	ctic	on E.												
PARTIAL WITHI	DRAWALS	S ON	LY: lı	nve	stm	en	t op	tic	on o	dra	wd	ow	n (i	if ir	า tv	ΝO	or	mo	re (opt	ior	ıs)	
Section does not nee	ed to be com	pleted	for a	full v	vitho	draw	ıal. C	om	plet	e th	is sec	tio	ı to	indi	cate	e fro	m w	hich	inve	estn	nent		
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Cash	\$. (0 0)															
Income Focused (default option)	\$. (0 0)															
Balanced	\$. (0 0																
Aggressive	\$. (0 0)															
Total	\$. (0 0)															
	Please ei	,									ne												

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Note: This form cannot be used to transfer to a SMSF. For a SMSF transfer please use the <u>Transfer to a self-managed super fund</u> form.

Name of the super fund you want to transfer your benefit to																						
want to transfer your benefit to																						
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ABN of fund	Austr	alian	busines	ss nu	mber																	
Your Member Client Identifier at the fund																						
USI of fund																						
	USI =	Unio	que Su	ipera	annua	ation	Iden	tifier														
*	Imp	ort	ant: 1	This	tra	nsfe	r ca	nno	t be	pro	cess	ed v	vith	out	the I	JSI.						

To transfer your benefit to more than one fund, please provide the details of the other fund(s) on a separate sheet of paper.

If you did not previously provide your TFN or have not provided it in Section A, or if your TFN cannot be validated with the ATO, you will need to provide identification documentation in accordance with Section E for your transfer to proceed.

If you withdraw all of your PSSap benefit resulting in the account being closed, and you are within the period of receiving Income Protection payments, you will need to let the insurer know your new superannuation fund and account number to ensure you continue to receive the superannuation contribution component.

PARTIAL WITHDRAWALS ONLY: Investment option drawdown (if in two or more options)

Section does not need to be completed for a full withdrawal. Complete this section to indicate from which investment option or mix of options your partial withdrawal amount will be paid from. You should only complete this part if you wish to make a partial withdrawal and your PSSap account balance is currently invested in two or more investment options.

Cash	\$. 0 0
Income Focused (default option)	\$. 0 0
Balanced	\$. 0 0
Aggressive	\$. 0 0
Total	\$. 0 0

Please ensure your total amount is the same as the partial withdrawal amount you listed above.



Identification requirements

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

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.

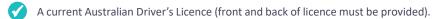
If the name we hold on file for you is different to the name on your identification, or two pieces of identification are in different names, please provide a certified copy of your Marriage or Change of Name certification.

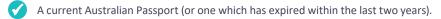
If you would like us to use DVS to verify your identification, please check both boxes below.
I confirm that I am authorised to provide the personal details presented and I consent to the information being checked with the document issuer or official record holder via third part systems for the purposes of confirming my identity.
I have attached identification for DVS verification.

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

Primary photographic identification

DVS compatibility is shown as or





A current Australian Proof of Age card (issued under a State or Territory law).

If your documents are 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

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.

Members residing overseas

If you live overseas and provided an overseas bank account, you need to meet 100 points of identification requirement 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.

Please contact us as we require further documents.

*Don't send original documents.

incompatible with DVS, don't forget to provide



Declare and sign this form

I declare that:

- the information I have provided on this form is true and correct
- I have read the <u>PSSap PDS</u>, and this application is made subject to the terms and conditions of that information
- I have provided certified proof of identity documents (if applicable) to prove my identity
- I acknowledge that if I am retiring due to permanent disability or permanent invalidity, it will be taken to be an application for an Invalidity Retirement Certificate (IRC) to be issued.

Sign
91811

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			/			/				

You have now completed this form.

If you wish to use DVS, please email your application and a copy of one of the listed ID requirements in **Section E** to: formsandapplications@pssap.com.au

Or

If you do no wish to use DVS, please send your completed form and your certified proof of identity documents to:

PSSap

Locked Bag 20117

Melbourne VIC 3001

Please note: If your documents are incompatible with DVS you must submit certified copies with your application via post.





Email



ne Financial 1300 277





