



Claim for Preserved Benefits after age 55 (including Ancillary Benefits)

Who should use this form?

Use this form if you:

- have Preserved Benefits in the Military Superannuation and Benefits Scheme (MilitarySuper);
- have reached age 55;
- wish to withdraw some or all of the Preserved Benefit from MilitarySuper (including by way of a rollover to an eligible fund or retirement savings account).

If you are under age 55, use form **M60** to claim your Member Benefit or form **MAC05** to claim your Ancillary Benefit. After completing this form, email or post it to Commonwealth Superannuation Corporation (CSC) at the details shown under **Part K** on **Page 13**.

Before you use this form

Before completing this benefit application form, it is recommended you read the **MilitarySuper Product Disclosure Statement (PDS)** or call **1300 006 727**.

Completing this form

Complete:

- **Part A:** About yourself
- **Part B:** Employment details
- **Part C:** Preserved Member Benefit options
- **Part D:** Preserved Employer Benefit options
- **Part E:** Preserved Ancillary Benefit options
- **Part F:** Identification requirements
- **Part G:** Payment instructions
- **Part H:** Document list
- **Part I:** Tax File Number
- **Part J:** Member declaration
- **Part K:** Lodgement

Then lodge with CSC at the address in **Part K**.

Options

Your MilitarySuper Benefit is made up of a Member Benefit, an Employer Benefit and, depending on your circumstances, an Ancillary Benefit. These benefit amounts will be calculated as at the date we receive your valid application, or your 55th birthday, whichever is later. The options for when and how you can withdraw, roll over or preserve each benefit component is subject to MilitarySuper scheme rules and the *Superannuation Industry (Supervision) Act 1993* and regulations, and are summarised below.



Military
Superannuation &
Benefits Scheme

Member Benefit

Your Member Benefit consists of your member contributions to MilitarySuper and the effect of investment returns on those contributions.

If you transferred from DFRDB, your Member Benefit includes your DFRDB contributions plus notional earnings on those contributions.

The options for your Member Benefit are:

- If you
 - (i) **have reached your preservation age, have ceased an arrangement under which you were gainfully employed, and CSC is satisfied that you intend never again to be gainfully employed; or**
 - (ii) **have reached age 60 and an arrangement under which you were gainfully employed ceased on or after reaching age 60.**

Your Member Benefit may be taken as a cash lump sum, rolled over, or preserved in MilitarySuper.

- **If you have not reached your preservation age (as shown on page three) and have ceased employment with the ADF at statutory retiring age, or you have ceased employment with the ADF after reaching your preservation age and are, or intend to be, otherwise gainfully employed,** access to the Member Benefit as a cash lump sum is limited to the value of the Member Benefit on 30 June 1999. The balance (interest earned and all contributions made after 30 June 1999) must be either preserved in MilitarySuper or rolled over as a compulsory preserved amount.
- **If you preserve any of your Member Benefit in MilitarySuper** it may be subsequently withdrawn in part or in full as a cash lump sum subject to the conditions mentioned in the two points above. If making a part withdrawal, it must be \$10,000 or a multiple of \$10,000 and there must be a minimum of six months between withdrawals.

Employer Benefit

The options for your preserved Employer Benefit are:

- **If you**
 - (i) **have reached your preservation age, have ceased an arrangement under which you were gainfully employed, and CSC is reasonably satisfied that you intend never to become gainfully employed; or**
 - (ii) **have reached age 60 and ceased employment with the ADF (including full-time Reserves duty) on or after age 60.**

You may preserve your total Employer Benefit in MilitarySuper, take it as a total lump sum benefit, or convert at least 50% to a pension and withdraw or rollover the balance as a lump sum.

- **If you have ceased employment with the ADF after reaching your preservation age and you are, or intend to be, otherwise gainfully employed** you may preserve your total Employer Benefit in MilitarySuper, rollover the total benefit to another super fund, or you can convert at least 50% to pension and rollover the balance. Any preserved Employer Benefit must remain preserved until permanent retirement from the workforce, or you satisfy another condition of release permitting payment of that benefit.
- **If you have not reached your preservation age and you have ceased employment with the ADF at your statutory retirement age** your options are to convert the total Employer Benefit to pension, or preserve it all in MilitarySuper.
- **If you have reached age 55 and ceased employment with the ADF (including full-time Reserves duty),** you may preserve your total Employer Benefit in MilitarySuper, roll over the total benefit to another super fund, or convert at least 50% to pension and roll over the balance. Any preserved Employer Benefit not converted to a pension must remain preserved until permanent retirement from the workforce, or you satisfy another condition of release permitting payment of that benefit.

Please note that if you do not elect to do anything with your Employer Benefit, it will continue to be preserved in MilitarySuper. A lump sum will only be payable to the extent permitted under applicable cashing restrictions. From age 65 you don't need to have ceased gainful employment to access your full lump sum benefit as cash.

Please note: If you claim your Employer Benefit in full, you won't be eligible to apply for retrospective invalidity at a later date*. If you feel that you should have medically separated from the ADF, you should contact us before claiming your Employer Benefit.

*Under special circumstances you may be eligible to apply for retrospective invalidity, however this may have financial implications for you.

Ancillary Benefit

An Ancillary Benefit consists of any of the following that have been paid into your MilitarySuper account:

1. Additional personal contributions
2. Salary sacrifice amounts
3. Transfer amounts

4. Spouse contributions (please note that spouse contributions are those paid by your partner into your MilitarySuper account)
5. Co-contributions
6. Super Guarantee (SG) amounts
7. Low income contributions

You may claim your entire Ancillary Benefit, or one or more Ancillary Benefit types, once you have met a relevant condition of release under superannuation law. You may roll over your Ancillary Benefit to another superannuation fund at any time. Any Ancillary Benefit type not claimed remains preserved in MilitarySuper. The Ancillary Benefit may be taken as a cash lump sum once you have:

- reached your preservation age (see below) and ceased an arrangement under which you were gainfully employed, and CSC is reasonably satisfied that you intend never to again become gainfully employed; or
- reached age 60 and an arrangement under which you were gainfully employed ended on or after you attained age 60.



Important: Cashing restrictions

The *Superannuation Industry (Supervision) Regulations 1994* determine how much of a lump sum can be accessed as cash. You can access your entire lump sum benefit as cash if:

- you have reached your preservation age and permanently retired from the workforce or
- you have reached age 65.

However, if you have not met one of the above conditions, your access to a cash lump sum will be restricted to the amount accumulated before 1 July 1999. The amount of lump sum you can access as cash is shown on your benefit estimate.

Preservation age

For the purposes of the summary of your benefit options above, preservation ages are set out in the following table:

Preservation age table

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
From 1 July 1964	60

Gainful employment

For the purposes of the summary of your benefit options above, you will not be considered to be gainfully employed, or intending to be gainfully employed, on a full-time or part-time basis if you work, or intend to work for less than 10 hours per week. If you are or intend to be gainfully employed, and have not ceased an employment arrangement on or after attaining age 60, you are not regarded as having retired from the workforce. Any benefit (excluding Pre 1 July 1999 member contributions) withdrawn as a lump sum must be rolled over to an eligible super fund as a preserved amount.

Please note: You do not need to have retired/ceased gainful employment to claim your Employer Benefit as a pension if you've reached your statutory retirement age.

Proportioning

The proportioning rule is a mechanism to calculate how much of your lump sum benefit payment is tax-free or taxable. If you claim your non-preserved (i.e. pre-1 July 1999) benefit, you can choose whether to apply all of your available tax-free amount against your lump sum (up to the amount of that benefit), or whether to apply the proportioning rules. For further information on how your benefit is taxed, see our **Tax and your MilitarySuper booklet**.

Where can you rollover your Ancillary Benefit?

You can rollover your Ancillary Benefit to:

- a regulated superannuation fund
- a Retirement Savings Account (RSA)
- an Approved Deposit Fund.

Rollover fund nominations

If you are choosing to rollover part of your benefit, it must be paid to a complying superannuation fund, rollover fund, or Retirement Savings Account (RSA). The receiving fund may deduct 15% tax from any untaxed component of the rollover.

You can nominate up to two rollover funds or RSAs to receive all or part of your lump sum benefit. Complete one nomination for each fund you want us to rollover benefits to.

Please make sure you have the correct postal address for your nominated fund(s) or RSA.

When completing your nomination, you must include the name and Australian Business Number (ABN) of the nominated rollover fund or RSA. If you have a membership number (known as your Member Client Identifier) and a Unique Superannuation Identifier (USI) for the rollover fund or RSA, please include these numbers. You can get these details from the rollover fund or RSA. Failure to include these details may delay your rollover.

Surcharge debt

If you have a superannuation contributions surcharge debt, it will be deducted from your benefit before payment. Interest will also be applied to the surcharge debt until the debt is fully paid. CSC must receive your surcharge election in writing.

In deducting the debt from your benefit, default provisions apply if you do not make an election. The default provisions are:

- If the Employer Benefit is converted to pension in part or full, any surcharge debt will be taken from the Employer Benefit after conversion to pension.
- If the Employer Benefit is taken as a total lump sum, the debt will be taken from the employer lump sum benefit.

If you choose to make an election, the default provisions will not apply. You may elect for the surcharge debt to be deducted from:

- the Employer Benefit before it is paid as a lump sum or converted to a pension;
- the Member Benefit before it is paid as a lump sum; or
- the Ancillary Benefit before it is paid.

Payment

Lump sum and rollover payments are normally paid within 15 working days after the date we receive your application and verify your eligibility, whichever is the later.

Tax File Number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct Pay as You Go (PAYG) tax at the full Top marginal rate, plus the Medicare levy from benefits, if a person does not provide a Tax File Number (TFN).

We are required to validate your TFN with the Australian Tax Office (ATO) 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.

If you claim a pension benefit, please complete the Tax File Number Declaration as available from the ATO. The information you provide on this form will determine how much tax will be deducted from your pension. Please note, that you can only claim the tax-free threshold against one source of income.

Further information

For more information on your options and how to complete this form, call **1300 006 727**.

You can also read:

- **MilitarySuper PDS**
- **Superannuation Contributions Surcharge** factsheet.

A Financial Advisor may also be able to assist. For more information, visit our **financial planning page**.

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 keeping 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 [here](#).

For more information

Visit: csc.gov.au

Email: members@enq.militarysuper.gov.au

Call: 1300 006 727

Mail: MilitarySuper, GPO Box 2252, Canberra ACT 2601

Fax: 02 6275 7010



Claim for Preserved Benefits after age 55 (including Ancillary Benefits)

A About yourself

Service Navy Army RAAF

Reference number (this will be your service number or PMKeys)

Reference number from a previous period of service (if applicable)

Title Mr Mrs Ms Miss Other

Surname

Given name(s)

Former surname (if applicable)

Date of birth / /

Contact details

BUSINESS HOURS

AFTER HOURS

MOBILE NUMBER

Would you like to receive an SMS to confirm we have received your application?
 Yes No

Email address

@

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

Postal address

SUBURB

STATE

POSTCODE



Military Superannuation & Benefits Scheme

➔ Section A continued on next page

Residential address

SUBURB **STATE** **POSTCODE**

Your marital status Single Married Couple relationship (including same sex couple relationship)

Date of marriage or couple relationship commencement:

/ /

Spouse's surname

Spouse's given name

Spouse's date of birth / /

B Employment details

Your employment status may affect the benefit options available to you.

Are you currently, or do you intend to be engaged in any gainful employment of 10 or more hours per week?

- No
 Yes

If you answer 'yes' to this question, please refer to 'Gainful employment' on page 3.

Please note: your benefit will be calculated as at the date we receive your application, or your 55th birthday, whichever is later. It will not be calculated from your date of separation from the ADF.

C Preserved Member Benefit options

Choose your options for the components of your Member Benefit (subject to proportioning). Any withdrawals must be in multiples of \$10,000 (and can only be every six months) or the total Member Benefit must be withdrawn. The options to withdraw, roll over or preserve your Member Benefit are subject to MilitarySuper scheme rules and the *Superannuation Industry (Supervision) Act 1993* and regulations, as summarised on page 2 of this document.

- Take all as lump sum (this option is only available if you have satisfied an appropriate Condition of Release).
- Continue to preserve the Member Benefit in MilitarySuper.
- Rollover all.
- Rollover \$
- and preserve the balance
- Take \$
- as a lump sum and preserve the balance*
- Take \$
- as a lump sum and roll over the balance*

* If you have not met an appropriate Condition of Release, access to your Member Benefit as a lump sum may be restricted. If you leave any benefit in the fund, it will remain allocated to the same investment strategy or strategies as it is currently, unless you complete a new **Investment Choice** form.

When you claim your MilitarySuper Benefit you may choose one of the following options for your non-preserved (i.e. Pre 1 July 1999) Member Benefit.

- Option 1**
Apply proportioning across the payment of your pre 1 July 1999 lump sum (in the same proportions as existed in your total Member Benefit).
- Option 2**
Apply all your available tax-free component against the payment of your pre 1 July 1999 lump sum.

D Preserved Employer Benefit options

Choose your option for the preserved Employer Benefit component (one only)—subject to proportioning. The options to withdraw, rollover or preserve your Employer Benefit are subject to MilitarySuper scheme rules and the Superannuation Industry (Supervision) Act 1993 and regulations, as summarised on pages 2 and 3 of this document.

Please note: If you claim your Employer Benefit in full, you won't be eligible to apply for retrospective invalidity at a later date[^]. If you feel that you should have medically separated from the ADF, you should contact us before claiming your Employer Benefit.

[^]Under special circumstances you may be eligible to apply for retrospective invalidity, however this may have financial implications for you.

- Continue to preserve the Employer Benefit in MilitarySuper.
- Convert all Employer Benefit to a pension.
- Take all as cash lump sum* (subject to meeting an appropriate condition of release).
- Rollover all.
- Convert % to a pension (must be 50% or more) and take the rest as
 - cash lump sum*
 - rollover to another super fund
- Take \$ GROSS as cash lump sum* and roll over the balance

* If you have not met an appropriate Condition of Release, access to your Employer Benefit as a cash lump sum may be restricted.

E Preserved Ancillary Benefit options

Please indicate whether you would like to take a cash lump sum of, or rollover, any or all of your Ancillary types, noting that **you can only cash out if you have satisfied an appropriate Condition of Release**. The option to withdraw your Ancillary Benefit is subject to MilitarySuper scheme rules and the *Superannuation Industry (Supervision) Act 1993* and regulations, as summarised on pages 2 and 3 of this document.

- Claim now: fill out the table below.
- Do not claim: go to **Part F**.
- Not applicable (you don't have an Ancillary Benefit): go to **Part F**.

Ancillary Benefit type		Cash Lump Sum (only available if you have satisfied Condition of Release)	Rollover
All types	100% only	<input type="checkbox"/>	<input type="checkbox"/>
OR			
i) Additional personal contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
ii) Salary sacrifice	100% only	<input type="checkbox"/>	<input type="checkbox"/>
iii) Transfer amounts	100% only	<input type="checkbox"/>	<input type="checkbox"/>
iv) Spouse contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
v) Co-contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
vi) Super guarantee	100% only	<input type="checkbox"/>	<input type="checkbox"/>
vii) Low income contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>

Surcharge

If you have a **Superannuation Contributions Surcharge** debt, you can elect to have your debt deducted in a particular manner.

How do you elect to have a **Superannuation Contributions Surcharge** debt deducted?

- Default provisions to apply
- From the Employer Benefit before it is converted to pension
- From the Member Benefit before it is paid as a lump sum
- From any Ancillary Benefit you are claiming

F

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 refer to our next 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.

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

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

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**, a rates notice, or 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.**



Payment instructions

Pensions - Employer Benefit only

If you are taking any of your Employer Benefit as a pension, give details of the account you want it paid into. The account must be in Australia.

Type of financial institution Savings bank Building society Trading bank Credit union

Name of institution

Branch name

Branch (BSB) number -

Section G continued on next page

Account number

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

Cash: Member, Employer and/or Ancillary Benefit

If you are taking any of your Member Benefit, Employer Benefit or Ancillary Benefit as a cash lump sum, give details of the account you want it paid into. The account must be in Australia.

Type of financial institution Savings bank Building society Trading bank Credit union

Name of institution

Branch name

Branch (BSB) number -

Account number

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

Rollover: Member, Employer and/or Ancillary Benefit

You may choose to have your Member Benefit, Employer Benefit and Ancillary Benefit rolled over together to the same fund (or the same two funds), or you may choose to rollover each of those benefit components into a different fund, up to a maximum of two funds for each component.

- Rollover all benefit components together to the same fund (or the same two funds): complete **Part A**.
- Rollover each benefit component to a different fund: complete **Part B**.

Write the nominated amount for each institution, except for the last (or only) fund, where you must write 'BALANCE' as the nominated amount.

*** 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.**

PART A

Name of rollover fund

Postal address of fund POSTAL ADDRESS

SUBURB STATE POSTCODE

Australian Business No. (ABN) of fund

Membership No. (known as your Member Client Identifier) for fund

Unique Superannuation Identifier (USI)

Amount \$

If you would like to rollover all of your benefit components to two funds, please attach the same details as above for the second fund.

All of your benefit components will be rolled over together directly to the nominated rollover fund(s). A copy of the Rollover Benefits Statement will be included with your benefit payment letter and sent to your nominated address.

PART B

Member Benefit

Name of **first** rollover fund

Grid for Name of first rollover fund: 2 rows, 20 columns each.

Postal address of fund

POSTAL ADDRESS: 2 rows, 20 columns each.

SUBURB: 1 row, 10 columns.

STATE: 1 row, 3 columns.

POSTCODE: 1 row, 5 columns.

Australian Business No. (ABN) of fund

Grid for Australian Business No. (ABN) of fund: 1 row, 11 columns.

Membership No. (known as your Member Client Identifier) for fund

Grid for Membership No. (known as your Member Client Identifier) for fund: 1 row, 20 columns.

Unique Superannuation Identifier (USI)

Grid for Unique Superannuation Identifier (USI): 1 row, 20 columns.

Amount

\$ [Grid for Amount: 1 row, 10 columns]

If you would like to rollover your Member Benefit to two funds, please attach the same details as above for the second fund. The nominated amount for the second fund must be 'BALANCE'.

Employer Benefit

Name of **first** rollover fund

Grid for Name of first rollover fund: 2 rows, 20 columns each.

Postal address of fund

POSTAL ADDRESS: 2 rows, 20 columns each.

SUBURB: 1 row, 10 columns.

STATE: 1 row, 3 columns.

POSTCODE: 1 row, 5 columns.

Australian Business No. (ABN) of fund

Grid for Australian Business No. (ABN) of fund: 1 row, 11 columns.

Membership No. (known as your Member Client Identifier) for fund

Grid for Membership No. (known as your Member Client Identifier) for fund: 1 row, 20 columns.

Unique Superannuation Identifier (USI)

Grid for Unique Superannuation Identifier (USI): 1 row, 20 columns.

Amount

\$ [Grid for Amount: 1 row, 10 columns]

If you would like to rollover your Employer Benefit to two funds, please attach the same details as above for the second fund. The nominated amount for the second fund must be 'BALANCE'.

Ancillary Benefit

For your Ancillary Benefit, write which Ancillary Benefit type you want paid to each fund (refer back to Part E). If you want all of your Ancillary Benefit to be paid into the nominated rollover fund, please write 'ALL' beside 'Ancillary Benefit type' below.

Name of **first** rollover fund

Grid for Name of first rollover fund: 2 rows, 20 columns each.

Postal address of fund

POSTAL ADDRESS: 2 rows, 20 columns each.

SUBURB: 1 row, 10 columns.

STATE: 1 row, 3 columns.

POSTCODE: 1 row, 5 columns.

Australian Business No. (ABN) of fund	<input type="text"/>
Membership No. (known as your Member Client Identifier) for fund	<input type="text"/>
Unique Superannuation Identifier (USI)	<input type="text"/>
Ancillary Benefit type	1) <input type="text"/>
	2) <input type="text"/>
	3) <input type="text"/>
	4) <input type="text"/>

If you would like to rollover your Ancillary Benefit to two funds, please attach the same details as above for the second fund. All Ancillary Benefit types must be allocated.

H Document list

If applicable, when you lodge this form, please provide the following documents:

- Copies of the documents required to identify you as the person entitled to the benefit, certified if necessary (see Section F).
- Medicare levy variation declaration (if you are claiming a Medicare levy exemption against a pension entitlement). The form is available online at ato.gov.au.
- Tax File Declaration Form (if you are claiming a pension).
- A copy of the ADF's acceptance of long service leave credit (if you are claiming an additional period). If you joined the ADF before 1 July 1983, your eligible service period (for PAYG taxation purposes in respect of any lump sum payments) may include periods of employment recognised for long service leave purposes.
- Other (please specify).

I Tax File Number

Under the *Superannuation Industry (Supervision) Act 1993*, CSC is authorised to collect, use and disclose your tax file number (TFN). We may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request to us in writing that your TFN not be disclosed to any other superannuation provider. Declining to quote your TFN is not an offence, however giving your TFN to us will have the following advantages:

- we will be able to accept all permitted types of contributions 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 find 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 us, you are under no obligation to provide it again in this application.

Your Tax File Number - -

Your Tax File Number remains confidential

J

Member declaration

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 been advised to read the **MilitarySuper PDS** and consider obtaining financial advice, before completing this application form.

I also declare in relation to my Tax File Number (TFN) that:

- I have read and understood the information set out in **Part I**: 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 rate.
- The TFN I have provided is the same number advised to me by the ATO.
- The TFN will be provided to a rollover fund unless I advise you not to.

I understand that if I have not provided 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

- I do not want my contact details passed to a commissioned independent research firm for the purpose of participating in research on the service provided by CSC.

K

Lodgement

Please post your completed original application and attachments to:

CSC
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