

Withdrawal form

The Victorian Independent Schools Superannuation Fund

(ABN 37 024 873 660, RSE Registration Number R1000436, MySuper Authorisation 37024873660599)

Trustee: VIS Nominees Pty Ltd (ABN 11 006 586 367, AFS Licence Number 235097, RSE Licence Number L0000321)

GPO Box 4974, Melbourne VIC 3001 | Telephone: 1300 660 027

Email: super@vissf.com.au Website: www.vissf.com.au

Use this form if:

- > Your benefit is to be paid to you – (**complete section 1** of this form);
- > All or part of your benefit is to be transferred to another superannuation fund – (**complete section 2** of this form); or
- > Part paid to you and part transferred to another fund – (**complete sections 1 and 2** of this form).

Proof of identification must be sent with this form (see the 'Completing proof of identity' section on page 3).

Title: Mr Mrs Ms Miss Other

*Family name:

*Given name(s):

*Address:

*Suburb:

*State/territory:

*Postcode:

*Telephone:

*Date of birth: / /

Tax File Number: - -

*Member Number:

*** Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.**

The trustee is authorised to ask for your TFN. Choosing not to provide your TFN is not an offence, however, there may be tax consequences if you fail to do so.

SECTION 1 – Please complete parts (a) and (b)

(a) Payment amount

Pay my entire benefit to me and close my VISSF account **OR**

Pay \$..... from my VISSF account to me.

(b) Confirmation regarding claims for a Preserved amount

I confirm that I have reached my Preservation age and I have permanently retired from the workforce **OR**

I confirm that I ceased employment with an employer making contributions to VISSF after I reached age 60 **OR**

I confirm that I am over age 65 **OR**

I am still employed and wish to withdraw my unrestricted non-preserved benefit

Any preserved benefit that cannot be paid to you, will remain in VISSF until you provide a further instruction.

Payment by Electronic Funds Transfer (EFT)

This is our preferred method to pay your super benefits. To pay via EFT, we require the details of an open Australian financial institution bank account. This account must be in your name (joint accounts are acceptable). We also require proof of your Australian bank account details, such as a copy of a recent bank statement. Please complete the details below:

Name of financial institution:

BSB Number - This six digit number identifies your financial institution

Account Number This number should not have more than nine characters nor include spaces.

Account Name: Your account name should be shown on your bank account records.

SECTION 2

Transfer my entire benefit and close my VISSF account **OR** Transfer \$..... of my benefit to:

Fund name:

Postal address:

Postcode:

Telephone:

Australian Business Number:

Policy or member number:

SPIN code:

My non-preserved benefit is to: be transferred to the other superannuation fund **OR** remain in VISSF

Residency Declaration

Recent changes to superannuation law mean that you now have to declare whether or not you were a temporary resident when applying to withdraw some or all of your super in cash. This is because temporary residents can now only claim a cash payment of their super after they have left Australia, or in special circumstances such as permanent or temporary incapacity, terminal illness or death.

A temporary resident is someone who holds a temporary visa as described in the Superannuation Industry (Supervision) Regulations 1994 or in the Migration Act 1958. Please note, we cannot process your withdrawal without this information.

(please tick the box that applies to you)

- I am an Australian citizen, New Zealand citizen or permanent resident of Australia;
- I am a former temporary resident, I have left Australia and I am not an Australian citizen, New Zealand citizen or permanent resident of Australia
- I am a temporary resident and hold either a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa
- I am a temporary resident and wish to claim payment on the grounds of permanent incapacity, temporary incapacity or terminal illness; or this application to withdraw super is on behalf of a deceased member. If any of these circumstances applies, please contact VISSF for assistance.

I declare that the information given by me is true and correct. I acknowledge that I have the right to ask the Trustee for information concerning my benefit entitlements and confirm that I do not require any further information.

*Signature *Date/...../.....

Checklist

- Have you completed all the mandatory fields on the form?
- Have you signed and dated the form?
- Have you attached the proof of identification?
- Has the proof of identification been certified by an approved individual? (See list on page 4).
- Have you attached a copy of your nominated bank account statement if requesting to receive any part of your benefit by Electronic Funds Transfer?

Please return completed form to:

VISSF, GPO Box 4974, Melbourne VIC 3001

Completing proof of identity

You will need to provide documentation to prove you are the person to whom the superannuation entitlements belong. Please read the following information carefully to ensure you have the right proof of identity documentation and the documentation has been certified by an individual approved to do so. (see page 4)

Acceptable proof of identity documents

The following documents may be used.

Note: If the documents provided are not in English you will also need to provide an English translation prepared by an accredited translator.

EITHER

One of the following documents only:

- > Driver's licence or permit that contains your photograph and name
- > Passport or similar document issued for foreign travel that contains your photograph, name and signature
- > A card issued under a law of a State or Territory for the purpose of proving your age which contains your name and photograph
- > A national identity card issued for the purpose of identification that contains your photograph and signature

OR

One of the following documents:

- > Birth Certificate or birth extract issued by a State or Territory
- > Birth Certificate issued by a foreign government or the United Nations
- > Citizenship certificate
- > Pension card issued by Centrelink entitling you to financial benefits

AND

One of the following documents:

- > Letter from Centrelink regarding a Government assistance payment
- > Notice issued by the Australian Taxation Office, a local government body or utilities provider within the past twelve months that contains your name and residential address and records a debt or service to that address or you
 For example:
 - Tax Office Notice of Assessment
 - Rates Notice from local council
- > If you are under age 18, a notice from a school principal issued within the preceding 3 months that contains your name and residential address.

Have you changed your name or are signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names. The following table contains information about suitable linking documents:

Change of name	Signed on behalf of the applicant
Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.	Guardianship papers or Power of Attorney.

Preserved benefits

Superannuation is a long-term investment and Government legislation may require that your benefit cannot be paid to you until some future time. That is, all or part of your benefit may have to be preserved.

Preserved benefits must stay in the superannuation system and can only be paid in cash once you have satisfied one of the following conditions of release:

- > you reach age 65;
- > if you cease employment with an employer who has been contributing to the fund, after reaching age 60 but not before;
- > you retire from the workforce after reaching your preservation age;
- > you die or become permanently disabled;
- > you are diagnosed as having a terminal illness;
- > you cease employment and have a preserved benefit of less than \$200;
- > you permanently depart Australia after being in the country on an eligible temporary visa;
- > you receive specific approval by the Trustee in the case of demonstrated severe financial hardship; or
- > the Australian Taxation Office approves the release of your benefit on specified compassionate grounds.

Your preservation age is based on your date of birth:

DATE OF BIRTH	AGE
After 30/06/1964	60
01/07/1963 – 30/06/1964	59
01/07/1962 – 30/06/1963	58
01/07/1961 – 30/06/1962	57
01/07/1960 – 30/06/1961	56
Before 01/07/1960	55

Non-preserved benefits

Restricted non-preserved benefits may be paid in cash if you satisfy one of the conditions for release of a preserved benefit or, generally, when you cease employment with your current VISSF employer.

Unrestricted non-preserved benefits can be paid to you at any time.

Authorised persons

In Australia, the following people are authorised to certify documents:

- > **Teacher** – full-time at a school or tertiary education institution
- > **Health professionals** – Chiropractor, Dentist, Medical practitioner, Nurse, Optometrist, Pharmacist, Physiotherapist, Psychologist, Veterinary surgeon
- > **Legal professionals** – Legal practitioner, Patent attorney, Trademarks attorney, Commissioner for Declarations or Affidavits
- > **Court professionals** – Judge, Magistrate, Master of a court, CEO of a Commonwealth court, Notary public, Registrar or Deputy Registrar, Bailiff, Clerk
- > **Police officer**
- > **Australia Post** – permanent employee of the Australian Postal Corporation with two or more years of continuous service
- > **Government representatives**
- > **Officer** – Bank officer, Building society officer, Credit union officer or finance company officer, authorised representative of, a holder of an Australian Financial Services Licence (AFSL) with over two or more years of continuous service
- > **Accountant** – Member of Institute of Chartered Accountants (ICA), National Institute of Accountants (NIA), CPA Australia (CPA), Association of Taxation and Management Accountants (ATMAA). A fellow of National Tax and Accountants Association (NTAA)
- > **Sheriff or Sheriff's officer**
- > **Minister of Religion or Marriage Celebrant**
- > **Member of** – Chartered Secretaries Australia, Australasian Institute of Mining and Metallurgy, Association of Taxation and Management Accountants and Engineers Australia (other than at the grade of student).