

Pension Application for a lump sum withdrawal



Please use **BLOCK** letters and black ink when completing this form.
This notification will be invalid if the Declaration is not signed and dated.

Membership details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname
<input type="text"/>	<input type="text"/>
Given Names	
<input type="text"/>	
Date of Birth	SMARTpension Number
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>
Telephone (Home)	Mobile
<input type="text"/>	<input type="text"/>

Amount of withdrawal

TICK ONE BOX ONLY

Please note that proof of identity must be provided for withdrawals. (See the reverse side for details).

I would like to withdraw the following amount (minimum \$1,000) from my account

My total benefit or Partial payment \$

Partial cash payment of \$ and partial rollover \$

Note:

Some legal restrictions apply where lump sum withdrawals are paid from your pension account.

Transition to Retirement Pensions

For Transition to Retirement pensions, you can only make withdrawals under the following circumstances:

- To access any unrestricted non-preserved funds;
- To rollover your account to another superannuation fund of income stream;
- To pay a superannuations contributions surcharge liability;
- To make a payment split under family law; or
- To release benefits following a successful request on financial hardship or compassionate grounds.

All Pensions

To receive a total payment, you must have received at least your pro-rata minimum pension payment for this current financial year, and for partial payments, there must be enough remaining in your account to make your pro-rata minimum payment for the minimum of the year.

If this is not the case, part of your withdrawal must be paid as pension payment. Where the total benefit owing is withdrawn, the Trustee is required to pay the minimum pension amount for the remainder of the year.

Payment of your total benefit will incur a \$50.00 withdrawal fee. Partial payments are free.

Certified proof of identity

You will need to provide documentation with this application form to prove you are the person to whom the benefit belongs. Your application may be delayed, or the trustee may refuse to make payment if you do not supply the appropriate documentation.

Please supply SMARTpension with a certified copy of a current driver's licence or passport. If you do not have either a driver's licence or passport, please call 1300 366 508 for information on what other documents SMARTpension will accept as proof of your identity.

"Certified" means a copy that has been seen and signed as a true copy of the original by a qualified person, such as a Justice of the Peace, a solicitor/barrister, or police officer.

Privacy

The information requested on this form is required in order to administer your membership. It may also be provided to specific organisations to provide services to you on our behalf. Your personal information will not be used or disclosed for any other purpose without your consent. If you do not provide the information requested, SMARTpension may not be able to administer your account. You may have access to the information SMARTpension holds about you. If you would like a copy of our Privacy Statement, please visit our website or call 1300 366 508.

Declaration

- I understand that if I have requested to withdraw my entire account balance my membership in SMARTpension will be terminated.
- I agree that my Tax File Number can be provided to the trustee of a fund to which I transfer or rollover any of my benefit.
- I have read the notes in this form and declare the information supplied by me is correct.
- I understand that by signing below I am authorising the Trustee to pay my SMARTpension benefit as indicated on this form and the trustee will be released from any further liability and obligation to me, reversionary dependant beneficiary, my legal personal representative or any other person claiming in respect of my participation in SMARTpension.

Signature of applicant

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

For further information

Phone 1300 366 508

Fax 1300 665 403

pensions_team@aas.com.au

www.smartpension.com.au

Please return this form to
SMARTpension
Locked Bag 5042
Parramatta NSW 2124

SMART
pension