

# Withdrawal Form

Please use **BLOCK LETTERS** and **black ink**.  
Complete this form to apply for a lump sum withdrawal.

## Send your completed form to:

Australian Ethical Super, Locked Bag 20013, Melbourne VIC 3001

If your name has changed recently, please update using the change of name form available on our website to avoid delays in your withdrawal.

## Step 1: Personal details

Member number

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Surname

Date of birth

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Full given name(s)

## Step 2: Condition of release

To receive a payment using this form you need to confirm that either:

- you have reached a preservation age and are genuinely retired
- you are aged 60 or above and have left employment or are changing your employer
- you are 65 or over
- you are totally and permanently disabled or have a terminal illness\*
- you are a temporary resident and are permanently departing Australia (excluding New Zealand)\*
- you are seeking a severe financial hardship payment\*
- you have approval from Medicare an agency of the Department of Human Services (DHS) that your money should be released for compassionate grounds\*
- your super benefit contains an unrestricted, non-preserved amount and you wish to make a withdrawal of some or all of that amount
- your super benefit contains a restricted, non-preserved amount and you confirm that you have ceased the employment that gave rise to that restricted amount

\* These claims require supporting documentation or the completion of additional forms. Contact us on 1300 134 337 for more information.

### Step 3: Rollover to another super fund (if applicable)

Is this a  full or  partial rollover. If partial, \$

Name of fund

Member number\*

USI

ABN

\*Member number or SPIN must be provided for your benefit to be rolled over

To rollover to multiple funds, please copy this section of the form and complete.

#### Additional requirements for transfers to self-managed super funds.

If you are transferring an amount to a self-managed super fund, you must ensure that the details you provide about your self-managed super fund on or with this application matches exactly the details shown in [superfundlookup.gov.au](http://superfundlookup.gov.au), including the registered address. Failure to provide matching details may result in requests for further information and delay the processing of your application.

- If your self-managed fund appears as a 'Complying' fund, you do not need to provide any documents relating to your self-managed fund.
- If your fund cannot be found on that website OR if your fund is listed with a 'Non-Complying' status, we will not process your request. You should resolve these issues with the ATO before submitting this application.
- If your self-managed fund appears as 'Registered - Status not determined', please provide a certified copy of one of the following documents:

- The Trust Deed of the self-managed super fund**  
– We prefer a certified copy of the full Trust Deed, however a certified extract containing at least the first 5 pages and the later pages that list each member of the fund and include the Trustee and Members' signatures will generally be sufficient. If we determine that the extract provided is not sufficient, we will write requesting further details.
- Bank statement showing the account name where the funds will be transferred.

**Please complete payment details in next section.**

## Step 4: Cash withdrawal and payment details

### Withdrawal amount

A partial withdrawal of \$   Full withdrawal

In some circumstances due to government regulations if you have elected to have your pension paid monthly, quarterly, six-monthly or annually we will need to pay your regular pension payment before we can complete your withdrawal request.

### Payment type

Bank account (Complete details below)

Name of Australian financial institution

Branch

BSB number

Account number

Account holder name

Account holder 2 name (if joint account)

**\*Note:** Please ensure that the bank account nominated is held in your name or in a joint account including your name.

I have attached a bank statement showing the nominated account name & number.

I have attached a certified copy of proof of identity (see over for requirements)

## Step 5: Declaration

- The details that I have provided are true and correct.
- I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I have received, read, and agree to the terms outlined in the Australian Ethical Super Product Disclosure Statement (PDS).
- I authorise Australian Ethical Super to give effect to the withdrawal.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Signatory's full name (please print)

## Proof of identity

As a requirement of the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF legislation), you need to provide identification documentation with this transfer request to prove you are the person to whom the super entitlements belong. Please provide to us either one certified primary photographic ID document or one certified primary non-photographic ID document PLUS one certified secondary document as listed below.

### People who can certify your identification documents include:

- a permanent employee of Australia Post who has two or more years of continuous service
- an officer of a financial institution, such as a bank, who has two or more years of continuous service
- a chartered accountant who is a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with two or more years continuous membership
- a legal practitioner (such as a solicitor) who is enrolled on the roll of the Supreme Court of a state or territory, or the High Court of Australia
- a Justice of the Peace
- a police officer.

### Your primary photographic ID document requirements

**You MUST supply ONE primary document from this list**

- Australian Driver Licence (current)
  - Australian Passport (not expired more than 2 years)
  - International Passport (current)
  - Proof of Age Card/NSW Photo Card (current and government issued)
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### Your primary photographic ID document requirements (ONLY required if no Photographic ID available)

**Select ONE valid option from this section only**

- Birth certificate
  - Citizenship certificate
  - Centrelink Pension Card (current)
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### Does your primary identification document contain both a photo AND your current residential address?

- Yes, no additional identification is required
  - No, you must also supply one secondary document that contains your current residential address
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### Secondary identification documents

**You MUST also supply ONE secondary document that contains your current residential address**

- Utility Bill or Council Rates Notice (less than 3 months old)
- Taxation Notice or Centrelink Statement (less than 12 months old)