

# Withdraw super from your Rollover Account

This is the form you should use when you withdraw your superannuation from your APSS Rollover Account.

The minimum amount you may withdraw from your APSS Rollover Account at any time is \$1,000 or the balance of your Account if your balance is less than \$2,000. Details on restrictions on accessing your superannuation are outlined in the *Your Member Savings Product Disclosure Statement (PDS)* and the *Guide to your Member Savings (Guide)* available in the *Publications & Forms* section at [apss.com.au](http://apss.com.au) or by calling *SuperPhone* on **1300 360 373**.

## Your Details

Gender:  Male  Female

Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Address: \_\_\_\_\_

State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Daytime phone: \_\_\_\_\_ Mobile phone: \_\_\_\_\_

Email: \_\_\_\_\_ Member number: \_\_\_\_\_

This number is shown on your Annual Benefit Statement.  
For Australia Post Employees it is the same as your APS number.

## Important

You must provide proof of identity as explained on page 3 of this form to enable your benefit payment to be processed.

## Payment instructions

If you are aged under 65, you need to complete the Retirement Statutory Declaration on Page 5 of this form to receive any immediate payment (unless you can demonstrate that you meet another applicable 'condition of release' under superannuation law).

### Your options

**Full withdrawal**  
Indicate dollar amount or percentage (must add up to 100%)

Receive an immediate payment: \_\_\_\_\_

Open an APSS Allocated Pension Account: \_\_\_\_\_  
(You must first receive and read the *Your APSS Pension Product Disclosure Statement (PDS)* and complete the application form attached to the PDS)

Rollover to an external super fund: \_\_\_\_\_  
(Complete details on page 2)

**Partial withdrawal**  
Indicate dollar amount or percentage

Receive an immediate payment: \_\_\_\_\_  
Select  gross OR  net amount

Open an APSS Allocated Pension Account: \_\_\_\_\_  
(You must first receive and read the *Your APSS Pension Product Disclosure Statement (PDS)* and complete the application form attached to the PDS)

Rollover to an external super fund: \_\_\_\_\_  
(Complete details on page 2)

## Note

Partial withdrawals will be made proportionally from the investment options applicable to you (namely, Cash, Conservative, Balanced and/or High Growth). If you are under your Preservation Age, you are only able to receive unrestricted non-preserved benefits as an immediate payment (if any), unless you satisfy another condition of release (refer to the *Your Member Savings PDS* and Guide, available at [apss.com.au](http://apss.com.au)).

## Withdraw super from your Rollover Account (continued)

### Details of external superannuation fund

(note: if you wish to transfer your super to multiple super funds, you will need to complete a separate form for each fund)

Name of fund: \_\_\_\_\_

Cheque made payable to: \_\_\_\_\_

Fund's address: \_\_\_\_\_

\_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Fund's phone: \_\_\_\_\_

Fund's Australian Business Number (ABN): \_\_\_\_\_

Fund's Superannuation Fund Number (SFN): \_\_\_\_\_

Fund's Unique Superannuation Identifier (USI) number: \_\_\_\_\_

Your member number: \_\_\_\_\_

Is this Fund a Self-Managed Super Fund (SMSF)  Yes  No

Name of bank: \_\_\_\_\_ Branch: \_\_\_\_\_

SMSF Account name: \_\_\_\_\_

Branch number or BSB (6 digits):  Account number (maximum 9 digits):

### Important

If you do not complete all of the fields of this form, there may be a delay in processing your request. If you need help with this form, call SuperPhone on 1300 360 373.

### Payment instructions for immediate payment

I wish for my immediate payment to be made by (please tick one box only):

Cheque  Transfer to my bank account

If you have ticked "Transfer to my bank account" option, and you have not provided your bank statement in the past 12 months, or if you are using a different bank account from your previous withdrawals, we will require a copy or original of a recently issued bank statement (issued within the past 3 months), OR a letter from your bank (on bank letterhead) OR a pre-printed deposit slip (clearly displaying the bank's logo). Any original bank documents will be returned to you upon request. If you do not provide these documents then your payment will be made by cheque.

Name of bank: \_\_\_\_\_ Branch: \_\_\_\_\_

Account name (must be held in your name): \_\_\_\_\_

Branch number or BSB (6 digits):  Account number (maximum 9 digits):

Continue to next page



## Withdraw super from your Rollover Account (continued)

### Authorisation to the Trustee of the APSS

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct;
- I am aware I may ask the Trustee of the APSS for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my insurance cover or benefits, and I confirm that I do not require any further information; and
- I discharge the Trustee of the APSS of all further liability in respect of the benefits paid and transferred to the APSS.
- If the Trustee of the APSS holds my tax file number, I understand that the Trustee of the APSS may disclose my TFN to another superannuation provider if my benefits are being transferred, unless I have requested in writing that the APSS not do this.

I request and consent to the transfer of superannuation as described in this form and authorise the superannuation provider of each fund to give effect to this transfer.

I request that you process my withdrawal request in accordance with my instructions and government legislation.

### Privacy Collection Statement

I acknowledge and understand:

- that my personal information will be collected by the Trustee (PostSuper Pty Ltd) and stored and dealt with in accordance with the Trustee's Privacy Policy, available at [apss.com.au](http://apss.com.au), for the purpose of managing and administering my APSS Account;
- that if my personal information is not collected, then the Trustee may not be able to manage and administer my APSS Account;
- that my personal information may be disclosed to the Trustee's service providers, professional advisers, regulatory bodies and my employer (if applicable) and other parties (as required) in the course of managing and administering my account, as required by law or with my consent;
- that my personal information may be shared with overseas organisations and that I can obtain details of the countries in which such organisations are located by reading the Trustee's Privacy Policy; and
- the Trustee's Privacy Policy contains information about how I can access and seek correction of any personal information held about me by the Trustee, how I can complain about a breach of the Privacy Act 1988 (Cth) and how the Trustee will deal with any such complaint.

I consent to the handling of my information in this manner and acknowledge that I can access my personal information by contacting the APSS.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Continue to next page



## Withdraw super from your Rollover Account (continued)

### Providing proof of identity

Under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, superannuation funds are required to have an anti-money laundering and counter terrorism financing program in place. A key element of this program is the requirement to identify customers in certain circumstances.

As a result, you need to provide identification documentation as detailed below to prove you are the person to whom the superannuation entitlement belongs. Your identification documents may need to be verified through an electronic website provided by the Australian Government. Processing of this form generally cannot proceed until we receive these identification documents. We may also need to ask you to provide further identification or verification documentation to meet regulatory requirements (including for transfers to a self-managed super fund). We will contact you if we require any further documentation.

You must provide:

#### EITHER

Original or certified copies of **one** of the following documents:

- Valid driver's licence issued under State or Territory law that contains a photograph of you.
- Valid passport issued by the Commonwealth, or similar document issued by a foreign government that contains your photograph and signature (If it is not in English, it must be accompanied by an English translation prepared by an accredited translator).

#### OR

Original or certified copies of **one** of the following documents:

- Birth certificate or extract issued by a State or Territory of Australia or a foreign government (If it is not in English, it must be accompanied by an English translation prepared by an accredited translator).
- Citizenship certificate issued by the Commonwealth or a foreign government (if it is not in English, it must be accompanied by an English translation prepared by an accredited translator).
- Pension card issued by Centrelink that entitles you to financial benefits.

#### AND

One of the following documents:

- Notice issued by Commonwealth, State or Territory government (no older than 12 months) regarding the provision of financial benefits that contains your name and residential address (such as a letter from Centrelink regarding a Government assistance payment).
- Notice issued by the Australian Taxation Office (no older than 12 months) that contains your name and residential address and records a tax debt payable to or by you.
- Notice issued by a local government body or utilities provider (no older than 3 months) that contains your name and residential address and records the provision of services to you.

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

If you have changed your name or you are signing on behalf of another person, 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 or between you and the person you are signing on behalf of. The following table contains information about suitable linking documents:

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

### Certification of identification and linking documents

All copied pages of original proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see the list on page 5). We will only accept documents where the date of certification is less than 12 months old.

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (e.g. Justice of the Peace, police officer, etc.) and date.

We may be required to ask for further identification from you in order to meet relevant regulatory requirements.

Continue to next page





## Withdraw super from your Rollover Account (continued)

### Persons who can certify copies of original documents as true and correct copies:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner.
- Australian Consular Officer.
- Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1995).
- Bailiff.
- Chief executive officer of a Commonwealth court.
- Clerk of a court.
- Chiropractor.
- Commissioner for Affidavits.
- Commissioner for Declarations.
- Dentist.
- Employee of the Australian Trade and Investments Commission who is in a country or place outside Australia, authorised under paragraph 3 (d) of the Consular Fees Act 1955, and exercising his or her function in that place.
- Employee of the Commonwealth who is in a country or place outside Australia, authorised under paragraph 3(c) of the Consular Fees Act 1955, and exercising his or her function in that place.
- Fellow of the National Tax Accountants' Association.
- Finance company officer with two or more years of continuous service.
- Holder of a statutory office not specified in another item in this list.
- Judge of a court.
- Justice of the Peace.
- Magistrate.
- Master of a court.
- Medical practitioner.
- Member of Chartered Secretaries Australia.
- Member of Engineers Australia, other than at the grade of student.
- Member of the Australasian Institute of Mining and Metallurgy.
- Member of the Association of Taxation and Management Accountants.
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants.
- Member of:
  - the Parliament of the Commonwealth; or
  - the Parliament of a State; or
  - a Territory legislature; or
  - a local government authority of a State or Territory.
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961.
- Non-commissioned officer of the Australian Defence Force with two or more years of continuous service.
- Notary public (including a notary public in a foreign country).
- Nurse.
- Officer of a Bank, Building Society or Credit Union, with two or more years of continuous service.
- Officer or Warrant Officer of the Australian Defence Force.
- Officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more continuous years of service with one or more licensees.
- Officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees.
- Optometrist.
- Patent attorney or trade marks attorney.
- Permanent employee of a Commonwealth, State or Territory Government with two or more years of continuous service.
- Permanent employee of a Commonwealth authority or a State or Territory authority or a local government authority with two or more years of continuous service.
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made.
- Pharmacist.
- Physiotherapist.
- Police officer.
- Psychologist.
- Registered marriage celebrant under subdivision C of Division 1 of Part IV of the Marriage Act 1961.
- Registrar, or Deputy Registrar, of a court.
- Senior executive service employee of the Commonwealth or a Commonwealth authority or a State or Territory, or a State or Territory authority.
- Sheriff or Sheriff's officer.
- Teacher employed on a full-time basis at a school or tertiary education institution.
- Veterinary surgeon.



Please return the **original copy** of this form to **APSS, Locked Bag A5005, Sydney South, NSW 1235**

**Note:** Faxes or emailed copies will not be accepted as we need an original signature.