

Withdrawal Form

This form serves as your instruction to us on how to deal with your benefit. We recommend that you consult your licensed financial adviser to assist you in your decision making.

Note: Former Temporary Australian Residents - Departing Australia Superannuation Payment members will need to complete a Departing Australia Superannuation Payment (DASP) form. To obtain a copy of this form, please contact our client services team.

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** (except for your email address) and **✓** boxes where provided.

1 Member details

Fields marked with an asterisk () **MUST** be completed for the purposes of anti-money laundering laws.

Member Type	<input type="checkbox"/> Employer	<input type="checkbox"/> Personal	<input type="checkbox"/> Pension
Member number	<input type="text" value="J"/> <input type="text" value="R"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
*Title	<input type="text"/>	*Surname	<input type="text"/>
*Given name(s)	<input type="text"/>		
Current residential address (MUST be provided)			
*Unit No	<input type="text"/>	*Street No	<input type="text"/>
*Street name	<input type="text"/>		
*Suburb	<input type="text"/>	*State	<input type="text"/>
		*Postcode	<input type="text"/>
*Country (if outside Australia)	<input type="text"/>		
Postal address (if different to above)			
*Unit No	<input type="text"/>	*Street No	<input type="text"/>
*Street name/PO Box	<input type="text"/>		
*Suburb	<input type="text"/>	*State	<input type="text"/>
		*Postcode	<input type="text"/>
*Country (if outside Australia)	<input type="text"/>		
*Contact phone number	<input type="text"/>	*Mobile	<input type="text"/>
			<input type="text"/>
Email address	<input type="text"/>		
*Date of birth	<input type="text"/>	/	<input type="text"/>
		/	<input type="text"/>
*Tax File Number ¹	<input type="text"/>	<input type="text"/>	<input type="text"/>

1 Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your Tax File Number (TFN), however if you do not provide your TFN before exiting the fund, any TFN contributions income tax that has been deducted from your account will not be claimed back on your behalf. Refer to the Withdrawal Instructions for more information. Please read the information on collection of TFNs in the Product Disclosure Statement before providing your TFN.

2 Residency details

Are you an Australian citizen, permanent resident or a New Zealand citizen?

Yes

No

If you ticked 'No' and are or have ever been the holder of a temporary resident visa, please speak to your financial adviser or contact our client services team on (07) 3222 8444.

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5 Rollover fund details

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

*Fund name

*ABN

Unique Superannuation Identifier (USI)

*Account/member number

Member client identifier (if different from Account/member number)

Fund address

Suburb State Postcode

Fund phone number

Cheque made payable to (SMSF only)

6 Financial institution details

Name of financial institution

Account name

Branch (BSB) number - Account number

Note:

- If bank details are not advised or unclear, a cheque will be made payable to the member and forwarded to the payee's recorded address.
- Payment made via cheque or direct credit cannot be made to a third party. If a third party is requested, a cheque in the name of the member will be forwarded to the member's postal address.

7 Claiming a tax deduction for non-concessional (personal) contributions

Only complete this section if you are eligible and wish to claim a personal tax deduction in the current financial year.

Eligible persons are generally those who have made non-concessional (personal) after-tax contributions to their superannuation and are self-employed, substantially self-employed or not eligible to receive superannuation support from an employer during the financial year.

Substantially self-employed persons are those whose assessable income, exempt income and reportable fringe benefits from employment as an employee (as shown on their group certificate) is less than 10 per cent of their total assessable income plus reportable fringe benefits.

Unsupported individuals are those who have retired, are under age 65 and have not received any superannuation support from another person during the financial year.

I intend to claim a personal tax deduction under section 290-170 of the Income Tax Assessment Act 1997 Yes No

If you have answered 'YES', a notice will be forwarded to you for completion.

Please note: Failure to notify us of your intention to claim a tax deduction will result in you being unable to do so once you have exited the fund.

8 Additional withdrawal payment instructions

Specific investment withdrawal instructions

Investment fund name	Amount	Allocation
<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"/> <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"/>	<input type="text"/> <input type="text"/> %

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9 Proof of identify

You will need to provide documentation with your withdrawal request to prove you are the person to whom the superannuation entitlements belong. You need to provide a **certified** copy of a document(s) that clearly shows your full name, your signature, date of birth and residential address.

To meet these requirements you must provide either a certified copy of A or B as below:

EITHER

A ONE of the following documents only

- current driver's licence issued under State or Territory law
- passport.

OR

B ONE of the following documents

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits.

AND

ONE of the following documents

- letter from Centrelink regarding a government assistance payment
- notice issued by Commonwealth, State or Territory government or local council within the past 12 months that contains your name and residential address (eg Tax Office Notice of Assessment or rates notice from local council).

Please refer to the Proof of identity requirements section for further explanation.

10 Member declaration

Important note: The Trustee collects the information in this form for the purpose of updating the information it holds about you. The information provided in this form will be used in accordance with the Privacy Policy at www.ioof.com.au/privacy.

*** Indicates a mandatory section. If you do not complete this section, there may be a delay in processing your request.**

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 my super 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.
- If the fund I am transferring my benefit to is a Self Managed Superannuation Fund (SMSF), I confirm that I am a trustee or director of a corporate trustee of the SMSF and I have provided a copy of the SMSF trust deed to verify this.
- I discharge the Pitcher Partners Superannuation Fund of all further liability with respect to the benefits once paid to the fund I am transferring to.
- I understand that all investment options will be converted to cash prior to transferring out of the fund.
- I consent that where I have chosen an investment with a long withdrawal period (illiquid investments) or there are delays receiving proceeds from selling my investments, any withdrawal or transfer request may be delayed for more than 30 days.

I request and consent to the transfer/withdrawal of super, as described above, and I authorise the super provider of each fund to give effect to this transfer.

*Member signature

*Date

 / /

Please forward all correspondence to

Pitcher Partners Superannuation Fund, GPO Box 1144, BRISBANE QLD 4001 Email info@pitcherpartners.com.au
Client services team (07) 3222 8444 Facsimile (07) 3221 7779 Website www.pitcher.com.au/Brisbane

IMPORTANT

Do not fax or email your certified documents. All certified documents must be posted so we can view an original signature.

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Proof of identity requirements

AML/CTF law obligates the Trustee to verify the identity of each applicant before providing financial services to them.

To meet these requirements you must provide either a certified copy of A or B as below:

EITHER A

ONE of the following documents only:

- current driver's licence issued under State or Territory law
- passport

OR B

ONE of the following documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits

AND

ONE of the following documents:

- letter from Centrelink regarding a government assistance payment
- notice issued by Commonwealth, State or Territory government or local council within the past 12 months that contains your name and residential address (such as Tax Office Notice of Assessment or rates notice from local council).

Have you changed your name or are you 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:

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

Certification of personal 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 below).

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 (such as Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- Chiropractor
- Dentist
- Legal practitioner
- Medical practitioner
- Nurse
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trade marks attorney
- Veterinary surgeon

Other persons:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- Bailiff
- Bank officer with two or more continuous years of service
- Building society officer with two or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner of Declarations
- Credit union officer with two or more years of continuous service
- Employee of the Australian Trade Commission who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3(c) 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; and
 - authorised under paragraph 3(d) 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
- Marriage celebrant registered under *Subdivision C of Division 1 of Part IV of the Marriage Act 1961*
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is either:
 - an officer; or
 - a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with two or more years of continuous service; or
 - a warrant officer within the meaning of that Act
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Member of either:
 - 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*
- Notary public
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more years continuous service with one or more licences
- Permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority; or
 - a local government authority; with two or more years of continuous service who is not specified in another item in this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of either:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution.