

Withdrawal form – Payment request

Use this form to:

- Request a payment from your account for a compassionate grounds claim, or
- Request a payment from your account for a Departing Australia superannuation payments (DASP)

Use a separate form (available on the Secure Online Portal) to request a payment from your superannuation account for the following reasons:

- Severe financial hardship,
- Temporary or permanent incapacity or a terminal medical condition,
- A transfer to a Kiwi Saver account,
- A withdrawal from your account where you meet a preservation condition of release, or
- A withdrawal to rollover your account to another superannuation fund including SMSF.

Before requesting payment, check:

- that you hold the letter providing compassionate claim details and you meet necessary condition of release requirements,
- that you meet the condition of release requirements for a DASP payment, available at ato.gov.au, and
- the ID requirements factsheet for what is appropriate certified identification and how to provide it. CERTIFIED identification is required for all compassionate claim withdrawals and for DASP payments over \$5,000.

Where the withdrawal will close your account, check:

- that all of your contributions from your employer have come into your account,
- where you are claiming a personal deduction for any personal contributions made to your account, you have sent us an ATO Notice of intent to claim a tax deduction, available at onesuper.com or via the ato.gov.au website, and
- your insurance:
 - closing your account will cause your insurance to cease; and
 - a lower account balance may affect the ability for premiums to continue to be paid.

CHECKLIST

On receipt of all required documentation, we will process your lump sum payment request as soon as we can. Our ability to process your lump sum payment request is dependent on:

- the application for lump sum payment being fully completed, and all of the necessary documents being provided, and
- where you hold investments in your account, you understand there may be delays while your investments are sold down. Please refer to the fund Product Disclosure Statement, and Additional Information Guide Terms and Conditions for details of the redemption of investment options.

Sending your payment or rollover request form and documents to us (allow time for postage):

- **post** your original completed and signed Withdrawal form with **clear and legible CERTIFIED copies** of original documents including identification to the fund postal address noted in contact details above.

PAYMENT REQUEST



Completing this form in BLOCK letters ensures we have a clear instruction.

To be valid, your application for a payment or rollover must be signed and dated.

Read the Privacy Policy on the last page to see how the fund uses your information.

STEP 1 PROVIDING YOUR PERSONAL DETAILS

Member number

Date of birth (DD/MM/YYYY)

Title

Given name(s)

Surname

Residential address

Preferred phone no

Phone (work)

Mobile (If available)

Email



By providing my email address and current details I authorise the fund to update my address and contact details if the details provided above differ to the details currently held. By providing my email address, I consent and authorise the fund to provide communications and information in an electronic format, via email or uploaded to the Secure Online Portal including information required by law.

Your tax file number (TFN)

I have already provided my TFN



We are authorised to ask for your TFN. You do not have to provide your TFN but if you don't, you may end up paying more tax than you need to. Further information can be found via ato.gov.au.

Identification requirements

- I have previously provided CERTIFIED photocopies of my original identification documents for my member account.



Refer to the *Identification requirements factsheet* on the Secure Online Portal for help on suitable identification documents and how to provide your certified identification. Please do not provide original documents.

STEP 2 CONFIRMING YOU ARE ELIGIBLE TO RECEIVE A PAYMENT



I understand that if I hold more than \$200 in superannuation my monies may need to be preserved, and the fund is required to confirm my eligibility to access my superannuation benefits.

From the options below select the option which applies to you

- I have received and attached a communication approving the release of funds from my account on compassionate grounds.
- I have attached evidence of my immigration status to support the release of funds from my account as a Departing Australia superannuation payment (DASP).

STEP 3 PROVIDING LUMP SUM PAYMENT DETAILS



A full lump sum payment or rollover will close my superannuation account and any insurance cover will cease. Investment earnings (positive or negative) tax, insurance and administration fees will change the final lump sum amount paid. Refer to the fund Product Disclosure Statement and the Additional Information Guide for terms and conditions for any disposal of investments necessary to make up your withdrawal.

Request a compassionate grounds lump sum payment (ATO approved payment)

- Provide a compassionate grounds lump sum payment amount \$_____

Note: No amount greater than the one approved by the ATO for a compassionate grounds payment can be released.

Paying to your bank account

Payment will be made into your Australian bank account by electronic funds transfer (EFT).

Lump sum payment bank account details

- My personal bank account details (held in my name or joint names with myself) are noted below

Name of financial institution

Branch

BSB

Account number

Account name

STEP 5 PLEASE READ THESE DECLARATIONS AND SIGN THIS FORM

- ▶ I am an Australian citizen, a New Zealand citizen or a permanent resident of Australia, and I meet the requirements for payment under compassionate grounds, or
- ▶ I meet the requirements for a Departing Australia superannuation payment (DASP), and
- ▶ I have supplied certified proof of my identity which shows my correct date of birth and any name change(s) if required, and
- ▶ The information I have provided in this form is true and correct and I authorise the fund to process my benefit in accordance with my request.

I understand

- ▶ There are costs associated with my account, as well as benefits I may be losing such as insurance cover (if any) and that any insurance held in my account will cease once my account is closed,
- ▶ If I have not already indicated an intention to claim a tax deduction, I won't be able to claim a tax deduction for my withdrawn contributions in the future once my account is closed.
- ▶ Where direct investment assets are held, there may be delays while your investments are sold down. I have referred to the Product Disclosure Statement, and Additional Information Guide Terms and Conditions for details on the order of redemption of investment options, and the minimum balance required to be held in the Cash Hub prior to submitting this withdrawal request.
- ▶ I consent to my personal information being used in accordance with OneVue Wealth Services Privacy Policy (available for viewing at onesuper.com), and I have read and understand how the fund will use my personal information.
- ▶ I have the right to ask the fund for information on how withdrawing my superannuation will affect my entitlements and have already done so, or have chosen not to exercise this right, and I discharge the fund from all further liability in respect of the benefits paid.

Full name

Sign here

Date (DD/MM/YYYY)

CHECKLIST

We will process your withdrawal request as soon as we can. Our ability to process your withdrawal request is dependent on:

- the withdrawal application being fully completed, and all of the necessary documents being provided, and
- for funds where you only hold pooled investment options in your account, allowing for the valuing of the investment option (unit price) as at the date of receipt of your withdrawal form.
- For funds where you hold direct investments in your account- there may be delays while your investments are sold down. For partial withdrawals, please ensure there are sufficient funds, including retaining the minimum balance, in your Cash Hub prior to submitting this form.



Please refer to the Product Disclosure Statement, and Additional Information Guide Terms and Conditions for details on the order of redemption of investment options.

Have you

- Completed all of the form, and signed and dated the form,
- Attached clear & legible CERTIFIED copy of any necessary documents including original identification documents,
- Provided the communication providing details of the payment requested, and
- Consulted the identification requirements factsheet on providing proof of identity. The identification requirements factsheet can be found on the FAQ/Forms page of the Secure Online Portal.

Sending your Withdrawal form and documents to us.

You can do that by **posting** your original form and **clear & legible CERTIFIED copies** of identification documents to the fund postal address noted in contact details.

PRIVACY POLICY

The collection of your personal information (PI) in this form is governed by the Privacy Act 1988 (Cth). OneVue Wealth Services uses your PI to administer your superannuation account (including insurance (if any)), improve our products and services and keep you informed. If we cannot collect this information, we may not be able to do these tasks. We may collect your PI from you, or from third parties such as your employer. We will only share your PI where necessary to perform our activities with our administrator, other service providers, as required by law or court/ tribunal order or with your permission. Your PI may be accessed overseas by some of our service providers.

For full details of how we use your PI, the countries where your PI may be accessed, how you can access and change your PI, and the privacy complaints process please read our Privacy Policy on the Secure Online Portal, or at the fund website onesuper.com.

The fund is a superannuation product within OneSuper ABN 43 905 581 638 RSE R1001341 (OneSuper). Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153 RSE Licence L0000635 (referred to as the Trustee, we, our, us) is the Trustee of OneSuper and the product issuer. The information in this document has been prepared by OneVue Wealth Services Pty Ltd ABN 70 120 380 627, AFSL 308868 as the Promoter. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation or needs. Before making any financial decisions about the fund, it is important that you read the current product disclosure statement (PDS) and Target Market Determinations (TMDs), consider your particular circumstances and whether the particular financial product is right for you. The current PDS and TMDs for the fund are available at onesuper.com. Each TMD sets out who an investment in the fund might be appropriate for and the circumstances that trigger a review of the TMD. You should consult a financial adviser if you require personal advice.