

Withdrawal Form (for cash only withdrawals)

For Accumulation Plan, Beneficiary Account and Income Stream members



Who should use this form?

You should use this form if you are a member of the Accumulation Plan, Beneficiary Account or Income Stream and want to make a cash withdrawal from your account. If you want to rollover money to another super fund, or to another ESSuper product you should complete the *Withdrawal Form (for Cash and Rollover Withdrawals)* – form (ES164). If you are terminating employment with an emergency services employer and want to claim your benefit, please complete the *Application for Superannuation Benefit* form instead, available from our Member Service Centre. For any term deposit investments, no withdrawal is permitted prior to maturity.

Please complete this form in pen using CAPITAL letters and mark with an [X] where applicable.

Section 1

Your personal details

Member/Pension no.

Title Mr Mrs Ms Miss Other (please specify)

Surname

Given names

Date of birth / /

Postal address

Suburb

State Postcode

Mark with an [X] if your postal and residential address are the same. If your residential address is different, please specify below.

Residential address

Suburb

State Postcode

Telephone (business hours) () (after hours) ()

Telephone (mobile)

If you are a temporary resident, please tick box **Note:** If you are a temporary resident, restrictions may apply. ESSuper will notify you if restrictions apply to this withdrawal.

Section 2

Account details

I am making this withdrawal from the following account: Accumulation Plan* Beneficiary Account Working Income Stream* Retirement Income Stream*

* No term deposit withdrawals prior to maturity.

Section 3

Employment status

I declare that I am: Permanently retired from the workforce (i.e. working less than 10 hours a week) Not permanently retired from the workforce

Section 4

Payment details

Partial withdrawal

OR

Full withdrawal (and close account)

Net amount to be withdrawn

\$ (This is the amount after tax has been deducted, if applicable)

Amount in words

Name of financial institution

Account holder name (e.g. John Citizen)

BSB number

- Account number

The account must be in the member's name or a joint account including the member's name. For Accumulation Plan and Beneficiary Account members, a minimum withdrawal of \$1,500 after tax applies. You can request a withdrawal via Members Online on the ESSSuper website where a minimum withdrawal of \$100 after tax applies. If as a result of this withdrawal, your account balance falls below \$5,000, ESSSuper may require you to withdraw your total balance.

Section 5

Certified Identification

If this is your first withdrawal to the bank account you nominated in SECTION 4, you are required to provide a certified copy of your identification. Certified copies are copies of original documents that have been verified and signed by one of the professional persons listed below. Certified copies provided must contain the **original** signature and cannot be a photocopy, scanned copy via email or facsimile. For all subsequent withdrawals to the same account, you will not be required to provide certified identification. For Income Stream members, certified identification is not required if the bank account you have nominated is the same account as for your regular income payments.

Please provide either:

Option 1: Current Driver's Licence or Passport

OR

Option 2: Either a birth certificate or extract, Australian citizenship certificate **OR** Centrelink pension card. **AND** A letter addressed to you from Centrelink regarding a benefit payment, a letter from a Federal, State or local government body showing your name and residential address, e.g. rates notice **OR** a Tax Office Notice of Assessment.

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 the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

Note: Key persons who can certify documents include (but are not limited to) an Accountant, Bank Officer, Justice of the Peace, Police Officer, Full-time Teacher or Medical Practitioner. For a full list, please call our Member Service Centre.

Section 6

Declaration and signature

I acknowledge and agree that:

- I have read and understood the Product Disclosure Statement relevant to my superannuation benefit which is available from ESSSuper and I understand the tax and investment implications of this withdrawal.
- For Income Stream members - This withdrawal will reduce my investment option balances based on the draw down order held on my account.
- For Beneficiary Account members - my previous employment with my emergency services employer did not cease whilst suffering from disability or ill health (as defined under the *Emergency Services Superannuation Act 1986*)
This withdrawal will reduce my investment option balances based on the order described in Accessing your super guide (BA.4) being Cash, Defensive, Conservative, Balanced, Growth, Basic Growth, Ethically Minded, High Growth & Shares Only.
- If I have requested an investment option change, my withdrawal may not be processed within the first 10 days of the month that my investment options change takes effect (e.g. if your investment options change takes effect from 1 July, your withdrawal may not be processed until 11 July).
- I have considered obtaining independent financial advice with respect to my superannuation options.

Signature of
account holder

 PLEASE SIGN HERE

Date

/ /

Please forward this completed form to

ESSSuper GPO Box 1974, Melbourne Vic 3001

T 1300 650 161 | F 1300 766 757 | www.esssuper.com.au

At ESSSuper, we treat the privacy and confidentiality of our members' personal information seriously. We are committed to complying with the guidelines of the *Privacy and Data Protection Act 2014* and the *Health Records Act 2001 (Vic)*. To obtain a copy of ESSSuper's privacy policy go to our website at www.esssuper.com.au