



State or Police accounts preservation claim



What do I use this form for?

If you have a State or Police account and are no longer employed by an employer who is paying contributions into your account, you can use this form to instruct QSuper to make a cash withdrawal (if eligible), elect to receive the lifetime pension (if eligible), transfer your benefit to a QSuper Pension account, or transfer your benefit to another complying superannuation fund. Please complete in dark blue or black ink.

You can stay with QSuper!

With QSuper, you pay no entry and no exit fees – just one management fee. Keeping your money within superannuation means your money remains in a concessional tax environment. It also means you can withdraw non-preserved money from your account whenever you want to (with a minimum withdrawal of \$2,000).

PLEASE NOTE:

If you are completing a section of the form and you see this symbol you must attach the requested document/s. Your claim cannot be processed until all required documentation has been received.



IMPORTANT NOTICE:

- Before completing this claim form, you should read the following fact sheets:
 - *State or Police preserved accounts*
 - *Tax explanation*
 - *Investment choice at a glance*

You can download a copy from our website, or call us and we'll send you one.
- If you choose to cancel your preservation arrangement prior to age 55, you will forfeit the difference between your withdrawal option and your preservation option. To retain your full benefit you need to leave it preserved in a State or Police account or in a QSuper Accumulation account until age 55.

IMPORTANT:

- Please read the notes on page 4 before providing your TFN.

PART A QSUPER ACCOUNT DETAILS

If you know your QSuper account number, please enter it in the box below.

Account number:

HELPING HAND

You can find your member number on your benefit statement.

PART B PERSONAL DETAILS

Title: Mr Mrs Miss Ms Dr

Surname¹:

Given names:

Postal address:

State: Postcode:

Residential address: Same as above Different (please provide below)

State: Postcode:

Previous surname¹:

Date of birth: / / (dd/mm/yyyy)

Phone number (home):

(work):

¹ If your surname has recently changed, please provide adequate documentation of the change.

PART C REASON FOR CLAIM – PLEASE TICK ONE OPTION

Maturity of preservation (on attaining 55)

Please tick one of the following:

I have no intention of ever seeking paid employment (full-time or part-time) again.

I intend seeking or continuing paid employment.

Cancel preservation (under 55)

Tax file number (TFN)

If you have previously given your TFN to QSuper, you do not need to supply it again.

TFN:

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PART D PAYMENT METHOD

OPTION 1

OPTION 1—transfer to my QSuper Accumulation account

You can leave your benefit in a QSuper Accumulation account. Partial withdrawals from your unrestricted non-preserved amount must be at least \$2,000. If you want to make a partial withdrawal and your account balance is less than \$2,000, you must withdraw your entire benefit. The unit price on the date of payment will be applied to your withdrawal.

\$ or %

I have read and understood the *Investment choice at a glance* fact sheet and I request QSuper to invest my total benefit in the following option/s:

	(Amount)		(Percentage)
Balanced	\$ <input type="text"/>	or	<input type="text"/> %
Cash Plus	\$ <input type="text"/>	or	<input type="text"/> %
Socially Responsible	\$ <input type="text"/>	or	<input type="text"/> %
Basic Growth	\$ <input type="text"/>	or	<input type="text"/> %
High Growth	\$ <input type="text"/>	or	<input type="text"/> %
Cash	\$ <input type="text"/>	or	<input type="text"/> %
Fixed Interest	\$ <input type="text"/>	or	<input type="text"/> %
Australian Shares	\$ <input type="text"/>	or	<input type="text"/> %
International Shares	\$ <input type="text"/>	or	<input type="text"/> %
Total			100 %

OPTION 2

OPTION 2—open a QSuper Pension account

To open a QSuper Pension account you must read the product disclosure statement (PDS) for the QSuper Pension account and complete the application form in the PDS. If you are under 60 you also need to complete and sign a *Tax file number declaration* form to avoid paying the highest marginal tax rate on your pension payment.

You should use this option if you want to transfer at least \$30,000 of your non-preserved money into a QSuper Pension account.

Please specify how much of your non-preserved money you want to transfer to a QSuper Pension account.

\$ or %

OPTION 3

OPTION 3—pay directly into my personal financial institution account

To ensure the security of your benefits, QSuper requires a copy of your bank, credit union, or building society account statement that shows your full name, address, and account details. QSuper cannot process your claim without this.

You should use this option if you want to withdraw some or all of your money in cash. If you select this option you must give us a copy of your bank, credit union, or building society account statement that shows your full name, address, and account details before we can make a payment. We cannot process your claim without this.

Please specify how much of your money you want to withdraw in cash.

Gross \$ or Net \$ or

(before tax) (after tax)

Name of bank, credit union, or building society:

Account name:

Account number:

Branch name:

Branch (BSB) number: (available from your bank, credit union, or building society)

Deposits can only be made to your personal bank, credit union, or building society account. They cannot be made to a business or loan account.

If you are under 60, tax may be deducted from your cash withdrawal. Please refer to the *Tax explanation* fact sheet for further information.

Please ensure you provide the correct account details, as neither QSuper nor your bank, credit union, or building society can accept responsibility for any delay or loss of interest caused by incorrect account details on this form.

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PART D PAYMENT METHOD (CONTINUED)

OPTION 4

OPTION 4—roll over to another complying superannuation or rollover fund

You do not have to transfer your benefit out of QSuper. If you want to leave your money with QSuper, you only need to complete option 1. If you are working for a non-Queensland Government employer, they may be able to pay contributions into your QSuper Accumulation account.

If you have withdrawn money as cash it cannot be rolled over to another superannuation account.

For QSuper to transfer money to another complying superannuation fund, we must be satisfied the superannuation fund complies with the *Superannuation Industry (Supervision) Act 1993*.

You should use this option if you would prefer to transfer any of your money to another complying superannuation fund.

Please specify how much of your preserved and non-preserved money you want to transfer to another complying superannuation fund. For example, if you want to transfer your entire benefit, you should place 100% beside both the preserved and non-preserved boxes.

Preserved component: \$ or %

Non-preserved component: \$ or %

Please complete the details of the other fund below or attach separate instructions.

Name of other fund:

Address of other fund:

State: Postcode:

Australian business number:

If your other superannuation fund is *not* a self-managed superannuation fund, please provide either the fund's superannuation product identification number (SPIN) or your policy/member number for that fund.

SPIN or policy/member number:



If your other superannuation fund is a self-managed superannuation fund, you must provide a copy of the letter of compliance that was issued by the Australian Taxation Office (ATO) when the fund was first created. This letter is titled *Acknowledgement of regulation as a superannuation fund*.

I have provided a copy of the ATO's letter, displaying the Australian business number (ABN) and name of the fund.

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You can leave your benefit in a QSuper Accumulation account. Partial withdrawals from your unrestricted non-preserved amount must be at least \$2,000. If you want to make a partial withdrawal and your account balance is less than \$2,000, you must withdraw your entire benefit. The unit price on the date of payment will be applied to your withdrawal.

PART E FEEDBACK

If you are rolling over funds from QSuper to another complying super fund, we would appreciate some feedback from you so we can improve our services.

Reason for withdrawal:

- I am transferring to my own self-managed super fund.
- I want to consolidate my super into one fund.
- I received a recommendation from my financial adviser (please specify organisation).
- QSuper's investment options don't meet my needs.
- I believe I can get higher investment returns elsewhere.
- I believe I can get lower fees elsewhere.
- Other (please specify).

PART F IDENTIFICATION REQUIREMENTS

For your claim to be paid, you must provide a **certified copy** of one of the following current documents, which contains your name, photograph, and either date of birth or residential address.

Please indicate which document you have attached:

- a driver's licence
- an Australian passport (or one which has expired within the last two years)
- a Proof of Age Card issued under an Australian State or Territory
- a foreign passport or similar travel document containing both a photograph and your signature (any documents written in a foreign language must be accompanied by an English translation prepared by an accredited translator).

If you are unable to provide any of the above documents, please contact the QSuper Contact Centre on 1300 360 750 for information on other documents you may provide to verify your identity.

See page 6 of this form for certification procedures and a list of approved certifiers.

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PLEASE NOTE:

The QSuper Board is committed to complying with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. In line with QSuper's anti-money laundering and counter-terrorism program, we require identification details with any claim you initiate on your QSuper account or as part of a claim as a beneficiary of a QSuper member's account. If you are acting on behalf of a QSuper member (e.g. under a power of attorney), both you and the QSuper member must supply identification as described in this section of the form. A certified copy of the power of attorney is also required.

PART G DECLARATION AND AUTHORISATION

- I declare I am the person named on this form, or have a power of attorney to act on the member's behalf.
- I request payment to be made in the manner indicated on this form and accompanying material.
- I declare the information given on this form is true and correct.
- I authorise QSuper to release details of my TFN to the ATO.
- I understand tax may be deducted from the withdrawal.
- I authorise QSuper to obtain personal information about me from my employer to ensure I receive the correct entitlements that are due to me.
- I declare that I am an Australian or New Zealand citizen, or a permanent resident of Australia.
- I understand that should a surcharge debt apply and a withdrawal request from QSuper be made, it will be deducted prior to the payment of the withdrawal.
- I have supplied the necessary documentation to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, as outlined in Part F of this form.

(Signature)

X

SIGN HERE

(Date--dd/mm/yyyy)

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PROVIDING YOUR TAX FILE NUMBER (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However, giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s
- the tax on contributions to your superannuation account/s will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

MAKING SURE YOUR CLAIM IS PAID

QSuper wants to make sure you get your claim processed as quickly and easily as possible. To help us do this, please take a few moments to review the following checklist—it will help ensure you complete this form correctly, and remind you to attach any necessary documents before sending this form to us.

- Did you provide all your relevant details in part B (Page 1)?
- Did you provide your TFN, if necessary?
- Have you selected an option in part C (Page 1) whether you are claiming the maturity benefit of a previously preserved amount or if you are cancelling a previous preservation arrangement?
- If you are between 55 and 59 (inclusive) have you chosen an option on page 1?
- If you selected option 1 in part D (page 2), have you chosen the investment option you want your money to be invested in?
- If you selected option 2 in part D (page 2), have you also obtained and completed the *QSuper Pension account membership application* form and if you are under 60, a *Tax file number declaration* form?
- If you selected option 3 in part D (page 2), have you provided a copy of the part of your bank, credit union, or building society account statement that shows your full name, address, and account details?
- If you selected option 4 in part D (page 3), have you provided full details of the rollover fund?
- If you are transferring your money to a self-managed superannuation fund, have you provided a confirmation letter of the fund's compliance, as outlined in option 4 (page 3)?
- Have you signed the declaration and authorisation in part G (page 5)?

REMINDER

Please attach additional documentation if necessary.

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Certification procedure

- Take the original and a copy of your selected documents to an acceptable certifier (see list below) who will verify that the original documents have been sighted.
- Ensure that the certifier sights the original and signs the copy, confirming it is a true copy of the original. The certifier must also include their name, the date of certification, and their certifying designation from the list of acceptable certifiers.
- Post this form and the certified copy of your identification to QSuper. We cannot accept facsimiles or copies of the certified documents. Please do not send us your original documents.

Who to see	Conditions and definitions
australia Post	An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public; or a 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.
Banking and other financial institutions	An officer with two or more continuous years of service with one or more financial institutions or a finance company officer with two or more continuous years of service with one or more financial companies.
Justice of the peace, commissioner for declarations, or notary public	An individual appointed by the courts whose duties include certifying documents.
Legal professionals/ law enforcement	A person who is enrolled on the roll of the Supreme Court of a State or Territory, or High Court of Australia, as a legal practitioner. Other professionals include a judge of a court, a magistrate, a chief executive officer of a Commonwealth court, a registrar or a deputy registrar of a court, or a police officer.
Accountants	A member of the Institute of Chartered Accountants in Australia, CPA Australia, or the National Institute of Accountants, with two or more years of continuous membership.
Consular or Diplomatic Officer	An Australian Consular Officer or an Australian Diplomatic Officer.

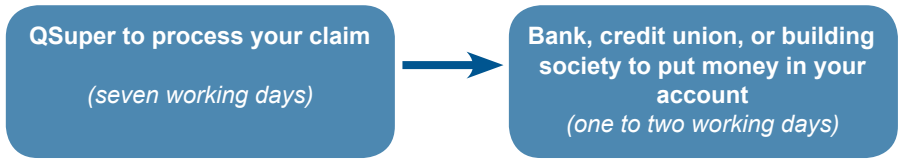
HOW LONG WILL IT TAKE FOR MY CLAIM TO BE PROCESSED?

Under normal circumstances, benefits are paid within seven working days of receiving this form and any necessary additional documents.

Please complete the checklist on page 5 of this form to make sure you have completed all required sections of the form and attached any necessary additional documents.

In the event of a significant market movement, QSuper may have to suspend processing to enable market movements to be incorporated in the unit prices before your claim can be paid. The unit price on the date of payment will be applied to your withdrawal.

Once QSuper has processed your claim, please allow one to two days for your bank, credit union, or building society to put your money in your account.



Contacting QSuper

Contact Centres

70 Eagle Street Brisbane
 63 George Street Brisbane
1300 360 750 (+617 3239 1004 if overseas)
 Monday to Thursday 8.30am to 5.00pm
 Friday 9.00am to 5.00pm

GPO Box 200
 Brisbane Qld 4001
 Fax 07 3239 1003

qsuper.qld.gov.au

ABN: 60 905 115 063
 SFN: 2610 419 41

The information has been prepared for general purposes only, without taking into account your financial objectives, situation, or needs, so it may not be appropriate for your circumstances. You should read the product disclosure statement (PDS) and consider your circumstances before you make an investment decision. You can download a PDS from the QSuper website, or call us and we'll send you a copy. The QSuper Board is not licensed to provide financial product advice.

The privacy of your personal information is important to us. QSuper Limited (ABN 50 125 248 286, AFSL 334546) is collecting this information on behalf of the QSuper Board of Trustees to administer your superannuation account. If you would like further information about our privacy policy, you can download QSuper's *Your privacy* fact sheet from our website. Alternatively, call us and we'll send you a copy.