



State or Police accounts 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 with QSuper 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.



Before completing this claim form, you should read the following fact sheets:

- *Tax explanation*
- *Investment choice at a glance* plus whichever of the State or Police fact sheets that may be applicable to your situation. You can download these from our website, or call us and we'll send you the ones you need.

In accordance with Commonwealth Government legislation, for partial withdrawals QSuper will withdraw your money proportionately from all tax components held in your account. Please refer to the *Tax explanation* fact sheet for further information.



Your claim cannot be processed until the attached *Employer certification* (pages 9–10) has been completed by your employer, all required documentation has been received, and all your contributions have been received from your employer.

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

Surname:

Given names:

Postal address:

State: Postcode:

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

State: Postcode:

Previous name¹:

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

Phone number (home):

(work):

Email address:

Date employment ended: / / (dd/mm/yyyy)

¹ If your name has changed since you last had contact with QSuper, please contact us for information on the additional documents you will need to provide.

PART C PAYMENT OPTIONS – PLEASE TICK RELEVANT BOX

Pay my benefit as:

- Lump sum
- Pension (payable for life – only for retirement and ill health claims, or members who are 65 or over and still employed)
- Part pension/part lump sum (only for retirement claims, or members who are 65 or over and still employed). Please indicate your option below

Pay % or \$ of benefit as a lifetime pension and the remainder as a lump sum.

or

Pay \$ as a lump sum and the remainder as a lifetime pension.

Please complete the relevant option for instruction for the payment of the lump sum.

IMPORTANT:

Please read the notes on page 5 before providing your TFN.

TAX FILE NUMBER

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

TFN:

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If you are under age 55 and resign you can choose to withdraw your Cash value, however, you will forfeit part of the employer component, which is the difference between the withdrawal option and the preservation option of your account.

Refer to the *State or Police accounts resignation* fact sheet and your benefit statement for more information.

To retain your full benefit you need to preserve it in a State or Police account or QSuper Accumulation account until age 55.

PART D REASON FOR CLAIM – PLEASE TICK ONE

- 65 or over and still working
 Resignation (see note to left)
 Retrenchment¹
 Retirement
 Ill health retirement

¹ You will need to attach a copy of the official correspondence from your employer confirming the circumstances and conditions of you leaving employment.

If you are between 55 and 59, please tick one of the following:

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

PART E LUMP SUM PAYMENT OPTIONS

This part only needs to be completed if you are taking part or all of your benefit as a lump sum or want to open a QSuper Pension account.

OPTION 1

OPTION 1—preserve benefit in my State or Police account

Only applicable for members under 55.

If you are under 55 you can choose to retain your full benefit by preserving your State or Police account. However, you must make this decision within three months of your resignation date. Refer to our *State or Police preserved accounts* fact sheet for more information. You can download a copy from our website, or call us and we'll send you one.

OPTION 2

OPTION 2—transfer to my QSuper Accumulation account

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 3

OPTION 3—pay directly into my personal financial institution account

Gross \$ (before tax) or Net \$ (after tax) or %

(You need to provide your account details in part G.)


If you are under 55 and withdraw the cash value of your Withdrawal option, the preserved amount will be transferred to your QSuper Accumulation account and invested in the Balanced investment option, or if applicable, your investment preference unless you provide alternative instructions in this claim.

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PART E LUMP SUM PAYMENT OPTIONS (continued)

OPTION 4

OPTION 4—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.





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 5

OPTION 5—roll over to another complying superannuation fund or rollover fund

-  You do not have to transfer your benefit out of QSuper after leaving employment with the Queensland Government. If you want to leave your money with QSuper, you only need to complete option 1 or option 2.
-  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 reasonably satisfied the superannuation fund complies with the *Superannuation Industry (Supervision) Act 1993*.

You should use this option if you want 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 write 100% beside both the preserved and non-preserved boxes.

Preserved component: \$ or %

Non-preserved component: \$ or %

Name of other fund:


Postal 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 letter displaying the Australian business number (ABN) and name of the fund.

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PAYMENT INFORMATION

Pensions must be paid directly into your personal bank account. You should therefore make sure the banking details in part G are complete.

PLEASE NOTE:



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.

- 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.
- Members who turn 65 and continue in current employment are entitled to 2/7ths of their retirement benefit. The remaining 5/7ths of their retirement benefit is payable on their retirement.

PART F PENSION OPTION

If you are taking part or all of your benefit as a lifetime pension, please provide the following details:

Marital status: Unmarried Married

Spouse/de facto's full name:

Spouse/de facto's date of birth: / / (dd/mm/yyyy)

If you are under 60, you will also need to attach a completed *Tax file number declaration* form with **your** personal details, which is available from the Australian Taxation Office or QSuper.

PART G FINANCIAL INSTITUTION DETAILS

You should use this option if you want to withdraw some or all of your money in cash, or if you are taking a lifetime pension. 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.

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)

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

PART H 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).

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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 I 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.

PART J 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** (cross out whichever is not applicable).
- 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 understand that should I/the member have a surcharge debt, and I request a withdrawal from QSuper, payment of this debt may be deducted prior to the payment of the withdrawal being processed. I authorise QSuper to make such a payment.
- If I have elected to withdraw some or all of my money in cash, I have attached a copy of the part of my bank, credit union or building society statement that shows my full name and account details. I understand my claim cannot be paid unless this information is provided.
- I have supplied the necessary documentation to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, as outlined in Part I, and have supplied any other requested documents as listed on page 6.
- I declare that I am an Australian or New Zealand citizen, or a permanent resident of Australia.

(Signature)

 **SIGN HERE**

(Date – dd/mm/yyyy)

/ /

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.

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i MAKING SURE YOUR CLAIM IS PAID

▶ QSuper wants to make sure your claim is 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)?
- Have you ticked a reason in part D?
- If you selected option 2 in part E (page 2), have you chosen an option regarding the investment option to be used for your money?
- If you selected option 3 in part E (page 2), have you completed part G (page 4) and provided a copy of the part of your bank or credit union account that shows your full name and account details?
- If you selected option 4 in part E (page 3), have you also obtained and completed the *QSuper Allocated Pension account membership application* form and if you are under age 60 a *Tax file number declaration* form?
- If you are taking part or all of your benefit as a lifetime pension, have you completed part F and part G?
- If you selected option 5 in part E (page 3), have you provided full details of the rollover fund, including the ABN?
- 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 part E (page 3)?
- Have you signed the declaration and authorisation in part I (page 5)?
- Have you had your *Employer certification* completed by your employer and provided it with this claim form.



REMINDER

Please attach additional documentation if necessary.

CERTIFICATION PROCEDURE

- Take the original and a copy of your selected documents to an acceptable certifier (see list to the right) 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. |

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REMINDER

Employer certification

Please ensure your employer completes the attached certification.

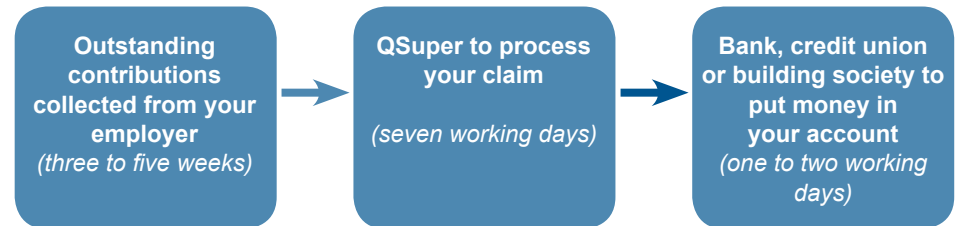
Your payment cannot be made without this completed form

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

Your benefit cannot be paid until all your contributions are received from your employer, which can take three to five weeks after you have left employment. Under normal circumstances, when all contributions are received, benefits are paid within seven working days of receiving this form and any necessary additional documents. Please complete the checklist above 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.



State or Police accounts employer certification



What do I use this form for?

This form is used by employers to advise QSuper of salary and final contributions for State or Police account members who have stopped working for the Queensland Government. Please complete in dark blue or black ink.

It is the responsibility of the member to have this employer certification completed by their pay office. Payments cannot be made without this completed form.

PLEASE NOTE:

ONLY provide details of State or Police account on this certification

CODES

- A = Award variation
- B = Basic
- CA = Certified agreement
- I = Incremental
- O = Other
- P = Promotion or reclassification

The final contribution required for QSuper State or Police accounts is the last complete fortnight prior to termination date.

EMPLOYER CERTIFICATION – TO BE COMPLETED BY YOUR EMPLOYER

Employee's payroll number:

Title: Mr Mrs Miss Ms Dr

Surname:

Given names:

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

Member's salary details for last two years. Please provide the date and salary of all changes over the last two years.

(If member is employed part-time, provide full-time equivalent salary)

Salary details:

| Date of effect (dd/mm/yyyy) | Fortnightly salary | Code* (Must be completed) |
|-----------------------------------------------------------------------------------------------------------------------------------|-------------------------|---------------------------|
| <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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Deduction details:

Pay period in respect of which final contribution/adjustment was, or will be, made:

(pay cycle ending): / / (Date – dd/mm/yyyy)

Amount of final employee contribution/adjustment: \$

Details of leave without pay for periods in excess of ten working days:

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

Type of termination:



Important:

Please turn over page to complete this form.

State or Police accounts claim employer certification

PLEASE NOTE:

QSuper is unable to process your employee's claim until these details are provided. Please complete this certification and present the claim form to your employee when they terminate employment. You should also make sure your employee obtains the following documents from the QSuper website to assist them in submitting their claim:

- *State or Police account claim form*
- *Tax explanation fact sheet and*
- *Investment choice at a glance fact sheet* plus whichever of the following fact sheets is relevant:
- *Resignation: State or Police accounts*
- *Retirement: your State account options*
- *Retirement: your Police account options*
- *Retrenchment prior to age 55 for State accounts*
- *State or Police accounts permanent disability*

Where an employee has been retrenched or accepted a voluntary early retirement (VER) please ensure you attach a copy of your official correspondence to the employee confirming the details of the retrenchment or VER.

EMPLOYER CERTIFICATION (continued)

Employer details:

Name of authorised officer:

(Signature)

 **SIGN HERE**

(Date - dd/mm/yyyy)

/ /

Pay office code:

Phone number:

Stamp:

Checklist

- Have you provided full-time equivalent salaries and all changes for the past two years?
- Have you provided details of the final contributions in respect of this employee?
- Have you provided your details to us, including pay office code and stamp?
- Have you attached a copy of official correspondence confirming employee's retrenchment or VER (if applicable)?

Reminder:

Please attach additional documentation if necessary.

Contacting QSuper

Contact Centres

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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
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qsuper.qld.gov.au

ABN: 60 905 115 063
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