

QSuper Pension account claim



What do I use this form for?

You should complete this form if you want to make either a full or partial withdrawal from your QSuper Pension account. Please complete in dark blue or black ink.

RULES:

- Withdrawals must be at least \$5,000 and can be made up to four times in a financial year.

PLEASE NOTE:

- If you were under age 60 at, and commenced your pension prior to, 1 July 2007, making a withdrawal may change the taxable portion of your pension if you have not since met one of the following trigger events:

- received a part or full commutation of your benefit (either lump sum or rollover), or
- reached age 60.

If you think this applies and you would like further information please contact QSuper on 1300 360 750.

PART A QSUPER ACCOUNT DETAILS

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

Account number:

HELPING HAND

You can find your account 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 name:

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

Phone number (home):

(work):

PART C WITHDRAWAL OR TRANSFER DETAILS

Tick only one of the withdrawal/transfer options:

Full withdrawal or transfer

Partial withdrawal¹ \$ gross (before tax)

\$ net (after tax)

¹ If you are using the transition to retirement option, you are only able to withdraw unrestricted non-preserved monies.

Based on your account balance, your partial withdrawal is taken proportionately from the two tax components that make up your benefit.

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PLEASE NOTE:

- ☒ If you opened your account using the transition to retirement option, and you have unrestricted non-preserved monies, just select the fourth box in part D.
- ☒ QSuper aims to process your claim within three working days from when this form is received, provided all required information has been received. The QSuper Board has the discretion to suspend unit prices if it requires further validation of a unit price for any reason. If the QSuper Board uses this discretion, information will be available on the QSuper website. The unit price on the date of payment will be applied to your withdrawal.
- ☒ If you are under 60, tax may be deducted from your payment. If you would like more information, you should read our *Tax explanation* fact sheet which you can download from our website, or call us and we'll send you one.

PART D REASON FOR WITHDRAWAL OR TRANSFER

i Important: This part only applies if you have taken the transition to retirement option.

- I have reached my preservation age and have permanently retired (this means you have finished working and have no intention of ever seeking paid employment, full-time or part-time, in the future).
- I have reached age 60 and ceased gainful employment with an eligible QSuper employer – please note you can still be working elsewhere.
- I have reached age 65.
- I am wanting to withdraw an unrestricted non-preserved amount.
- I want to close my QSuper Pension account and transfer the balance to a QSuper Accumulation account.

PART E WITHDRAWAL INSTRUCTIONS

I request this withdrawal be drawn from the following investment 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	%

If no instruction is given for this withdrawal, it will be made in accordance with your existing investment mix.



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PART F PAYMENT DETAILS

OPTION 1

OPTION 1—pay directly into my personal bank or credit union account

PAYMENT INFORMATION

-  Deposits can only be made to your personal bank or credit union account. They cannot be made to a business or loan account.
-  Neither QSuper nor your bank or credit union can accept responsibility for any delay or loss of interest caused by incorrect account details on this form.

I confirm I would like QSuper to pay this claim:

into the same account my QSuper Pension account payments are paid into

into the account listed below.

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

Name of bank or credit union:

Account name:

Account number:

Branch name:

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

OPTION 2

OPTION 2—remain a member of QSuper

I request the QSuper Board of Trustees invest this deposit in the following investment option/s in a QSuper Accumulation account.

Before choosing your investment option/s, you should ensure you have read and understood the information contained in the *Investment choice at a glance* fact sheet. You can download a copy from our website, or call us and we'll send you one.

	(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 %





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PART F PAYMENT DETAILS (continued)

OPTION 3

OPTION 3 – Roll over to another complying superannuation fund.

PLEASE NOTE:

-  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*.
-  QSuper does not charge a fee to roll over your benefit. You can also contact QSuper concerning the effect your rollover may have on any current benefit you have with QSuper.
-  **You are required to provide details of the SFN or ABN of the fund you are rolling over to and their SPIN or your member number with that fund. If this information is not provided or other details are not fully completed, your rollover cannot be processed. You can obtain these details from the fund you are rolling your benefit to.**
-  If you are taking care of the member's affairs due to a power of attorney or an enduring power of attorney, you need to supply us with an original or a copy of this document, certified as a true and complete copy of the original under the *Powers of Attorney Act 1998*. This certification can be done by a justice of the peace, commissioner for declarations, lawyer, or notary public. Original documents will be returned to you once the payment has been finalised.

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 %

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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PART G 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.

What is the reason for your withdrawal? (Please tick all that apply)

- My new employer is unable to contribute to QSuper.
- I am transferring to my own self-managed super fund.
- I want to consolidate my super into one fund.
- I want to invest outside super.
- 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).

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 H 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.

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



Important:

Please ensure you sign and date the declaration and authorisation in **PART I** on the next page ►

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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 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.

PART I 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]¹.
- 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/the member's TFN to the Australian Taxation Office.
- I understand tax may be deducted from the payment.
- I have supplied the necessary documentation to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, as outlined in Part H of this form.
- I understand that if I was under age 60 at, and commenced my pension prior to, 1 July 2007, and have not previously met a trigger event, that making a withdrawal may change the taxable portion of my pension.

IF REMAINING A MEMBER OF QSUPER

- I declare I have read and understood the *Investment choice at a glance* fact sheet and understand that neither the capital invested nor the investment returns of QSuper are guaranteed by the QSuper Board of Trustees, QSuper Limited, the State of Queensland, or any other party.

¹ Cross out whichever is not applicable.

(Signature)

X SIGN HERE

(Date – dd/mm/yyyy)

□ □ / □ □ / □ □ □ □

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 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.