

Cancel a Lifetime Pension

When to use this form

Complete this form if you want to cancel your Lifetime Pension. Remember, you cannot cancel your Lifetime Pension after the cooling-off period (six months from the date the pension commenced). Do not complete this form if you want to close a Lifetime Pension as a result of a terminal medical condition. Please complete our *Claiming a Terminal Medical Condition Benefit* form. All our forms are available at qsuper.qld.gov.au/forms or call us to request a copy.

- To be eligible to cancel a Lifetime Pension and receive a full refund of your purchase price, you must make sure we receive your completed form before 5pm Queensland time of the day your 14-day cooling-off period expires.
- If we receive your completed form more than 14 days after product commencement, but before your six-month cooling-off period expires, your refund will be adjusted to reflect any negative investment returns, pension payments you have already received, and any legislative limits imposed on commutations.
- Please also note that where a Lifetime Pension was opened with death benefit monies, it can only be refunded as cash to the original eligible recipient of a superannuation death benefit.

For further information, please see the *QSuper Product Disclosure Statement for Income Account and Lifetime Pension* or call us on **1300 360 750**.

Please complete this form in **BLOCK** letters, in blue or black ink.

1 Personal details

Client number

You can find your client number on your annual statement or by logging in to Member Online.

Title

First name/s

Last name

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy)

 / /

Home phone number

Mobile phone number

Work phone number

Email address

Postal address

State

Postcode

Residential address

As above

State

Postcode

2 Lifetime Pension account you wish to cancel

If you have more than one Lifetime Pension with us, please specify which one you want to cancel.

Lifetime Pension account number

¹ If your name has changed, please send us a certified copy of either a marriage certificate or other legal change of name document.



Part of Australian Retirement Trust

3 Payment method for your withdrawal

Your Lifetime Pension will be closed, and you will receive payment for the amount you're entitled to. You can receive your benefit as a lump sum payment into your bank account (**Option 1**). Depending on your circumstances, if you have a QSuper Accumulation account or another Accumulation account with Australian Retirement Trust, you can choose to transfer your benefit into one of these accounts (**Option 2**). You also have the option to rollover your benefit to another super fund (**Option 3**).

Where a Lifetime Pension was opened with death benefit monies, it can only be refunded as a lump sum payment (**Option 1**).

If you choose to transfer your money to a QSuper Accumulation account, or another Accumulation account with Australian Retirement Trust, you can request to make a partial withdrawal before your account is opened.

Option 1 – Total lump sum withdrawal

- Pay the money into the same bank account I nominated for my Lifetime Pension payments.
- OR
- Pay the money into the bank account specified in the 'Your bank account details' section of this form.

Your bank account details (if required)

If you selected to pay the money into a different bank account, please provide us with your account details.

We can only make payments into an Australian bank, credit union, or building society account that's in your name or a joint name. This means we can't make payments into a business, trust, or loan account.

You should know that if you provide incorrect details, there could be a delay in your payment, a loss of interest or a loss of funds, and we cannot accept responsibility for this.

Bank name

Branch (BSB) number

Account number

Account name (e.g. John & Jane Citizen)

Option 2 – Transfer my funds to my current Accumulation account (QSuper, or another Accumulation account with Australian Retirement Trust only)

- Make a partial withdrawal before transferring to an existing Accumulation account.

I want to withdraw (net):

\$

I want to transfer to:

- The same bank account I nominated for my Lifetime Pension payments.
- OR
- The bank account specified in the 'Your bank account details' section of this form.

Pay the remaining money into:

- My existing QSuper Accumulation account
- OR
- My existing Australian Retirement Trust Accumulation account:

Account number

Option 3 – Rollover to another super fund

Fund name

Product name

Client/account number

Fund phone number

Fund USI/SPIN

Fund ABN

The fund **Unique Superannuation Identifier (USI)** can be found on the other fund's website and might be called a SPIN. **We may not be able to process your request without this.**

4 Proving your identity

You can prove your identity by either:

Electronic identification

(not available for people currently living overseas)

To prove your identity electronically, please provide us with your driver's licence or passport number.

From here QSuper will provide your name, address and date of birth to a credit reporting agency (CRA) to check if your personal information matches your credit information file with the CRA. This will allow us to verify you under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* before making your payment. It doesn't give us access to other information about you, our request won't be recorded on your credit information file and the CRA can't use it for anything else. If we cannot identify you in this way, we will write to you advising the name of the CRA and another way to verify your identity.

I confirm that I am authorised to provide the personal details presented and I consent to my information being checked with the document issuer or official record holder.

Driver's licence number

State of issue

Passport number

Previous name

Country of birth

OR

Certified identification

You can post, email or fax us certified copies of your identification document as explained in the *Proving Your Identity* factsheet available at qsuper.qld.gov.au/factsheets

Please note that we will need to receive and verify your identification within the relevant cooling-off period.

5 Attachments to send with this form

If you are proving your identity using the paper method, please attach certified copies of your identity documents as explained in our *Proving Your Identity* factsheet.

If we know you by another name, please attach certified copies of your marriage certificate or another legal change of name document.

If you're signing as a power of attorney and you haven't already given us a certified copy of your power of attorney documentation, please attach it to this form. You must also attach certified copies of your and the member's identification documents.

6 Declaration and authorisation

- I am the person named on this form, or I have a power of attorney to act on the member's behalf.
- The information I have given on this form is true and correct.
- I understand that the amount I receive during the cooling-off period could be subject to the capital access schedule. For more information, see the *QSuper Product Disclosure Statement for Income Account and Lifetime Pension*.
- I understand that once my Lifetime Pension has been closed, I can't reopen it.

Name

Signature (electronic signatures are not permitted)

Date signed (dd/mm/yyyy)

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Where to send this form

Please send this form to us at:

Post: QSuper
GPO Box 200
Brisbane QLD 4001

Email: qsuper@qsuper.qld.gov.au

We will do our best to process your request within three working days of receiving your form and all the required information. This might take us longer during busy periods.

If you have questions

If you need any help completing this form, please call us on **1300 360 750**.

Member Centres**70 Eagle Street, Brisbane****63 George Street, Brisbane****Sunshine Coast University Hospital**, Ground Floor,
Main Hospital Building, 6 Doherty Street, Birtinya**Member Services team****Phone** 1300 360 750**Overseas** +61 7 3239 1004

Monday to Friday 8.00am – 6.00pm (AEST)

Postal address GPO Box 200, Brisbane QLD 4001**Email** qsuper@qsuper.qld.gov.au**Fax** 1300 242 070**Website** qsuper.qld.gov.au

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