

# State or Police Account Preservation Claim

## When to use this form

If you have a preserved State or Police account, please fill out this form if you would like to transfer your benefit to an Accumulation account, make a withdrawal, or transfer your benefit to another complying super fund. If you want to open a Transition to Retirement Income account or a Retirement Income account, you will also need to complete the *Open an Income Account* form, at the back of the *Product Disclosure Statement for Accumulation and Income Accounts* available at [qsuper.qld.gov.au/pds](http://qsuper.qld.gov.au/pds)

### Important information

If you are under age 55 and choose to withdraw or transfer your cash value, you will lose the difference between the amount of the withdrawal option and the amount of the preservation option. To keep your full benefit, you need to preserve it in your State, or Police account until age 55.

Before completing this claim form, please read the *Accumulation Account Guide*, *Income Account Guide*, *State Account Guide*, *Police Account Guide* (whichever applies to your situation), the *Tax Explanation* factsheet, and the *Proving Your Identity* factsheet.

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

## 1 Personal details

Client number

Your client number can be found by logging in to Member Online or on your annual statement.

Title

First names

Last name

Previous name<sup>1</sup> (if we know you by another name)

Date of birth (dd/mm/yyyy)

Home phone number

Mobile phone number

Work phone number

Email address

Residential address

State

Postcode

Postal address

As above

State

Postcode

## 2 Providing your tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, your super fund is authorised to collect your tax file number (TFN), which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. If you transfer your super to another fund we may disclose your TFN to the other super provider unless you tell us not to in writing. It is not an offence not to quote your TFN. However, providing your TFN to your super fund will have the following advantages (which may not otherwise apply):

- Your super fund will be able to accept all types of contributions to your account(s)
- The tax on employer contributions to your super 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 super benefits
- It will make it much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

Your TFN

You do not need to provide your TFN again, if you have already given it to us.

<sup>1</sup> If your name has changed and you work for the Queensland Government or default employer, let your payroll office know and they will then let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.

### 3 Reason for withdrawal or transfer

- Withdrawal option – I have reached age 55** and want to transfer my State or Police account, or make a cash withdrawal.
- Preserved option – I am under age 55** and want to transfer or claim my cash value (that is your unrestricted non-preserved amount and includes your personal contributions and interest paid before 1 July 1999, plus any employer contributions paid before 1 July 1999).

**Please note:** If you choose to withdraw or transfer your cash value before you turn 55, you will lose the difference between the amount of the withdrawal option and the amount of the preservation option. You can find more information about this in our *State Account Guide*, or *Police Account Guide*, available on our website at [qsuper.qld.gov.au](http://qsuper.qld.gov.au) or call us to request a copy.

### 4 Withdrawal options

- Option 1 – Transfer to an Accumulation account**  
You should choose this option if you want to transfer your funds to an Accumulation account.

\$  OR  %

#### Accumulation account insurance

If eligible, you may receive default insurance cover with an Accumulation account. For available insurance and information on eligibility terms and conditions, please refer to the *Accumulation Account Insurance Guide*.

- I do not want to receive default cover.**
- This means we will not automatically provide you with cover again, even if your employment situation changes. If you want to take out cover again, you can apply any time, subject to the eligibility terms and conditions at that time.
  - Default insurance cover is provided in addition to any personalised Accumulation account insurance you may hold. We will not cancel any existing personalised cover as a result of this selection.

#### Investing in the Accumulation account

Tell us how you would like your transferred balance invested in your Accumulation account.

- Invest my transferred balance according to my current investment preference or use the default option. **Go to section 5.**

OR

- Invest my transferred balance in the following way:

Investment option	Allocation	Investment option	Allocation
Lifetime	<input type="text"/> %	Cash	<input type="text"/> %
Moderate	<input type="text"/> %	Diversified Bonds	<input type="text"/> %
Balanced	<input type="text"/> %	International Shares	<input type="text"/> %
Socially Responsible	<input type="text"/> %	Australian Shares	<input type="text"/> %
Aggressive	<input type="text"/> %	<b>Total</b> <small>(must add up to 100%)</small>	<input type="text"/> %

- Option 2 – Withdraw a lump sum from your benefit**

You should choose this option if you want to withdraw some or all of your money.

#### Amount you want to withdraw:

\$  OR  %

#### Pay the money into the bank account below:

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.

#### Bank name

#### Branch (BSB) number

#### Account number

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

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

**Option 3 – Transfer my benefit to another complying superannuation fund**

You should choose this option if you want to transfer your benefit to another complying superannuation fund.

Amount you want to transfer:

\$  OR  %

Details of your other fund

Fund name

Client/account number

Phone number

Australian Business Number (ABN)

Superannuation Product Identification Number (SPIN)

Postal address



State

Postcode

I want to transfer my money to a self-managed super fund (SMSF), and I confirm that I am a member, trustee or director or a corporate trustee of the SMSF.

**If you are not making a withdrawal or transferring to an SMSF, please go to section 6.**

## 5 Proving your identity

You can prove your identity by either:

### Option 1 – 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

### Option 2 – Certified identification

You can post, email or fax us certified copies of your identification document as explained in the *Proving Your Identity* factsheet on our website.

## 6 Finding your other super

If we have your TFN, we can use it to find any other super you may have. This could include lost super, other active accounts and any other money held by the ATO. If we find any other super, we'll write to you to see if you want us to consolidate it into your QSuper account. You can also contact us and let us know if you'd like to stop these searches at any time.

By providing us with your TFN and personal details, you give us permission to use your TFN to contact other super funds and the Australian Taxation Office (ATO) to find out if you have other superannuation monies, to receive the results of any ATO searches of the ATO's super records, to receive transfers or payments of any amount identified through the search process and otherwise assist in consolidating your super accounts.

I want QSuper to find my other super.

## 7 Declaration and authorisation

- I confirm I am the person named on this form, or have a power of attorney to act on the member's behalf.<sup>2</sup>
- I ask that payment is made in the way I have chosen on this form.
- The information I have given on this form is true and correct.
- If I am under age 60, I understand I may have to pay tax on cash withdrawals.
- I understand that any insurance I already hold or receive as a result of submitting an application for an Accumulation account will be cancelled by QSuper in certain circumstances.<sup>3</sup>
- I am an Australian or New Zealand citizen, or a permanent resident of Australia.
- I understand that if there is a surcharge debt I need to pay on my benefit, QSuper will deduct this before my money is withdrawn.
- I understand I may ask my superannuation provider for information about any fees or charges that may apply, or any other details about the effect this transfer may have on my benefits.
- I confirm that I have obtained all the information and documentation that I need for this claim to be processed.

### Signature

(Please sign in blue or black pen – QSuper does not accept electronic signatures on this form.)

Date signed (dd/mm/yyyy)

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### Where to send this form

Please send your completed form to us by:

#### Post

QSuper  
GPO Box 200  
Brisbane QLD 4001

#### Email

qsuper@qsuper.qld.gov.au

### Checklist

Please use the below checklist to help ensure you give us all the information we need to process your request.

- 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 at [qsuper.qld.gov.au/factsheets](https://qsuper.qld.gov.au/factsheets)
- 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.

Once we have all the information we need, we will do our best to process your request within seven working days of receiving your form and all information.

<sup>2</sup> If you have not already done so, you need to give us an original certified copy of the power of attorney document.

<sup>3</sup> There are various circumstances when cover will end. See the *Accumulation Account Insurance Guide* at [qsuper.qld.gov.au/pds](https://qsuper.qld.gov.au/pds)

#### Member Centres

**70 Eagle Street, Brisbane**  
**63 George Street, Brisbane**  
**Sunshine Coast University Hospital**, Ground Floor,  
Main Hospital Building, 6 Doherty Street, Birtinya

#### Member Service team

**Phone** 1300 360 750  
**Overseas** +61 7 3239 1004  
Monday to Thursday 8.30am – 5.00pm (AEST)  
Friday 9.00am – 5.00pm (AEST)

**Postal address** GPO Box 200, Brisbane QLD 4001  
**Email** [qsuper@qsuper.qld.gov.au](mailto:qsuper@qsuper.qld.gov.au)  
**Fax** 1300 242 070  
**Website** [qsuper.qld.gov.au](https://qsuper.qld.gov.au)

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