

Withdraw from your pension

1800 005 166
info@spiritsuper.com.au
GPO Box 1547, Hobart TAS 7001

Use this form to withdraw or transfer funds from your pension account.

Important information

- You may receive a final pension payment if you haven't received your pro-rata minimum payment for the financial year and you've requested a full withdrawal or transfer.
- Part withdrawals and transfers from Transition and Control Pensions will be paid in line with your chosen future transaction investment strategy.
- If you make a part withdrawal from a Managed Pension account, your payments will remain the same until 30 June. We'll recalculate your pension income on 1 July and your payment rate may be reduced.
- You should seek personal advice to confirm if this payment will have tax or social security implications.
- Once your completed form has been received, it usually takes around five business days to pay withdrawals or three business days to transfer to another super fund.

Section 1 Your details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

First name

Middle name/s

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email

Section 2 Reason for requesting a payment

Place an X in the box below that applies to you. Select one only.

Make a withdrawal – go to section 3.

Transfer to a Spirit Super account – go to section 4.

Transfer to another super fund – go to section 5.



Section 3 Make a withdrawal

Are you withdrawing from a Transition Pension account?

We're unable to process withdrawals from Transition Pension accounts if this section is left blank.

We may need to convert your account to a Control Pension in order to process your request. The transfer balance cap limits the amount you can transfer into retirement phase accounts like the Control Pension, and penalties may apply. Contact us for more information.

We may contact your employer to verify your answers.

Place an X in the box below that applies to you. Select one only.

I've reached my preservation age (see table below) and have permanently retired. I don't intend to work again for 10 or more hours a week.

Date of retirement (DD MM YYYY)

I'm aged 60-64 and have ended an employment arrangement since turning 60.

Date your employment arrangement ended (DD MM YYYY)

I have 'unrestricted non-preserved' money.

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60

All withdrawals

Your withdrawal will be paid to the same bank account that your pension is paid. Contact us if you need to change your bank account.

I want to withdraw:

my full account balance

OR

an amount of: \$

I want to receive the amount shown above **after** tax has been paid. Tax may be payable if you're under 60.

To keep your pension account open, you need to leave a balance of at least \$6,000, or your minimum annual pension amount less payments already received this financial year, whichever is greater. We may adjust the amount specified above to meet these requirements.

Section 4 Transfer to a Spirit Super account

My Spirit Super account number:

If you don't have a **Spirit Super** account, we'll set one up for you.

Transfer the following amount to a Spirit Super account:

my full account balance

OR

an amount of: \$

To keep your pension account open, you need to leave a balance of at least \$6,000, or your minimum annual pension amount less payments already received this financial year, whichever is greater. We may adjust the amount specified above to meet these requirements.

Section 5 Transfer to another Super fund

Transfer the following amount to another super fund:

my full account balance

OR

an amount of: \$

To keep your pension account open, you need to leave a balance of at least \$6,000, or your minimum annual pension amount less payments already received this financial year, whichever is greater. We may adjust the amount specified above to meet these requirements.

New super fund details:

Fund name

Phone

Member number

USI

ABN

I'm transferring to a self-managed super fund

Self-managed super fund name

ABN

Electronic service address (ESA)

Self-managed super fund bank account name

BSB number

Account number

Section 6 Member declaration

By signing this form I'm making the following statements:

- I declare I've fully read this form and the information is true and correct.
- I discharge the Spirit Super trustee from any further liability in respect of my benefits paid and transferred from Spirit Super.
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at spiritsuper.com.au/privacy-policy or by calling us on 1800 005 166.
- I request and consent to the payment of my benefits as described, and authorise Spirit Super to determine the tax treatment of my benefit.

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form to info@spiritsuper.com.au or Spirit Super, GPO Box 1547, Hobart TAS 7001.

