

SUPER PAYMENT REQUEST FORM



Please complete this form to request a full or partial lump sum payment or rollover from your accumulation or pension account. You must have provided proof of identity to Praemium in the last 12 months to enable a withdrawal from superannuation funds.

NOTE: If you wish to claim a tax deduction in relation to personal contributions made to an accumulation account, your adviser can complete a s290-170 notice online prior to requesting a payment or rollover out.

Part 1 - Member details (please complete all fields)

Super Member number	Street address	
Title	Date of birth	
Given name(s)	Town or suburb	
Surname	State	Postcode
Email	Phone	

For a rollover to another superannuation fund, please proceed to Part 2
For a lump sum cash withdrawal request, please proceed to Part 4

Part 2 - Rollover to another superannuation fund (if applicable)

Full rollover and account closure

Partial rollover of \$ (A minimum balance of \$10,000 must be retained in the account)

Fund name Unique Superannuation Identifier (USI) - non-SMSF only

Your destination fund member/account number

If the rollover is to an SMSF you must include the following details:

SMSF - Australian Business Number (ABN) SMSF - Electronic Service Address (ESA)

If your rollover is to an SMSF complete the Fund bank account details in Part 4.
For rollovers to other institutions proceed to Part 6.

Part 3 - Benefit payment amount (if applicable)

If you are under 60 years of age there may be PAYG tax applicable on your withdrawal.

Please select one of the following:

Full withdrawal and account closure

Partial withdrawal of \$ (a minimum balance of \$10,000 must be retained in the account)

For partial withdrawal requests, please indicate if this is a gross or net payment amount:

Gross (before tax is deducted)

Net (after tax is deducted)

Please complete bank account details in Part 4 and declaration in Part 5.

Part 4 - Bank account details

Provide bank account details for lump sum withdrawals or rollovers to an SMSF. Note: Payments can only be made to an Australian bank account held in the name of the member or their SMSF, respectively.

Bank account name

Bank account number

BSB

For lump sum cash withdrawals proceed to Part 5.

For rollovers to a SMSF proceed to Part 6.

Part 5 - Lump sum payment declaration

I declare that I am accessing the benefits entitled to me on the following condition of release:

I am aged 65 years or more; or

I have reached the age 60 and have ceased a paid employment arrangement after the age of 60; or

I have reached the age 60 and never again intend to be gainfully employed for 10 or more hours per week; or

I have reached preservation age and never again intend to be gainfully employed full time or part time (i.e. 10 or more hours per week); or

I have unrestricted non-preserved benefits; or

I am applying for early release of super due to permanent incapacity, compassionate grounds, severe financial hardship or terminal medical condition. (Note: this option requires more information. Please contact the Fund for more details.)

Proceed to Part 6.

Part 6 - Member declaration

I approve that fees, taxes or associated costs be deducted from the benefit withdrawn.

I authorise the use of my Tax File Number information understanding that its use and disclosure are strictly regulated by the tax laws and the Privacy Act.

I acknowledge that the Trustee cannot provide me with financial advice about the consequences of the withdrawal of my benefit and that I should consult an appropriately qualified adviser for such advice.

I understand that I can request appropriate information that I may reasonably require from the Fund for the purpose of understanding my benefit entitlement, including information about fees and charges that may apply.

Upon the closure of my account, I acknowledge there may be a loss of significant benefits and discharge the Trustee from any claims or liabilities in relation to my account.

I acknowledge that in order to claim a tax deduction in relation to personal contributions made to an accumulation account, a s290-170 notice needs to be submitted online by my adviser prior to requesting a payment or rollover out.

I declare that I have fully read this form and the information completed is true and correct.

Signature of member

Date

Name of member

Proceed to Part 7.

Part 7- Nominated Representative details

Contact details for the Nominated Representative associated with your SuperSMA account.

Title

Given name

Telephone

Surname

Email

Proceed to Part 8

Part 8 - Completing proof of identity

In accordance with Government guidelines, you must provide proof of identity according to one of the below options to enable a withdrawal from superannuation funds.

All proof of identification documents (including any linking documents) outlined below must be certified as true by an approved individual¹.

Option One - Provide one of the following only:

- Current driver's licence issued under State or Territory law
- Current passport

OR

Option Two

Provide one of the following:

- Birth certificate or extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits

AND one of the following:

- Letter from Centrelink regarding a Government Assistance payment
- Notice issued by Commonwealth, State or Territory government or local council within the last twelve months that contains your name and residential address

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you must provide a certified linking document that proves a relationship between two (or more) names. Below are suitable linking documents:

Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
To sign on behalf of applicant	Guardianship papers or Power of Attorney.

Please select the documents you are enclosing with this request in accordance with the above requirements:

- | | |
|---|--|
| Drivers licence issued under State or Territory law | Guardianship |
| Passport | Citizenship certificate issued by the Commonwealth |
| Change of name – Marriage Certificate/Birth Certificate | Pension card issued by Centrelink that entitles the person to financial benefits |
| Court Orders | Notice issued by the Commonwealth, State or Territory Government or local Council within the 12 months |
| Power of Attorney | |

How to certify

The person authorised to sight and certify documents must:

- sight the ORIGINAL and the copy and make sure they are identical, and
- write or stamp 'certified true copy' on all copied pages followed by their signature, printed name, qualification (e.g. Justice of the Peace), registration number (if applicable) and date.
- the documents should be certified within the last 12 months.

Who can certify my identification document?

For a full listing of people who can certify your documents, see 'Schedule 2 of the Statutory Declarations Regulations 2018'. Some of the people who can certify copies of originals as true copies are:

- a medical practitioner
- a nurse
- an optometrist
- a psychologist
- a pharmacist
- a chiropractor
- a veterinary surgeon
- an accountant (member of ATMA, CA ANZ, CPA or IPA)
- a teacher permanently employed full time or part time basis at a school or tertiary institution
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public
- a police officer
- a Justice of the Peace
- a magistrate
- a bank officer with 2 or more continuous years of service
- a marriage celebrant
- a member of the Governance Institute of Australia Ltd
- a permanent employee of the Australian Postal Corporation with 5 or more years of continuous service
- a SES employee of the Commonwealth.

What if I don't certify my identity documents correctly?

If the identification documents you send with your application are not certified or incorrectly certified, you may need to resend certified proof of identity documents. This will lead to delays in processing your instruction.

Please ensure you have enclosed all supporting documents as specified in Part 8. Any incomplete forms or missing documents may cause a delay in the processing of your request. Your benefit payment will be calculated after we have received all the relevant and completed documents.

For any questions or if you need assistance call 1800 571 881 or email support@praemium.com.au.

Return this completed form and any supporting documents to your Nominated Representative or by email to support@praemium.com.au.

Praemium Super. Issued by Diversa Trustees Limited ("Trustee") ABN 49 006 421 638 AFSL 235153M RSE Licence No L0000635 as trustee for Praemium SMA Superannuation Fund (SuperSMA) ABN 75 703 857 864 RSE Reg R1074352.