

# PENSION WITHDRAWAL APPLICATION

Use this form to withdraw some or all of your pension.

## Before you start...

Fill this form out in **BLOCK** letters using a **black or blue pen**. Write '**X**' to mark boxes.

If you make a mistake while completing this form, simply cross it out and initial to verify your change. Your application will be invalid if you use liquid paper or don't sign the form.

- Emailed copies won't be accepted.
- For more information, read the **Pension Product Disclosure Statement (PDS)** at [teamsuper.com/pds](https://teamsuper.com/pds)
- Allow at least five working days to process your withdrawal from the date we receive this withdrawal form.
- Please note that withdrawals don't count towards your minimum pension amount.
- By law, we must report all account details for income streams to Services Australia. For more information on income streams, go to [servicesaustralia.gov.au](https://servicesaustralia.gov.au)

For a **TOTAL** withdrawal, complete **Sections 1, 2, 3 and 5**. If you only want a **PARTIAL** withdrawal, you must also complete **Section 4**.

### 1. Your personal details

Mr  Ms  Mrs  Miss  Dr  Other       Male  Female       Member number

Given names

Surname       Date of birth (DD-MM-YYYY)  -  -

Residential address

Suburb       State       Postcode

Postal address. If the same as your residential address, mark '**X**' in this box

Suburb       State       Postcode

Mobile phone       Home phone

Email

## Turn over to finish filling out this form...



## 2. How much do you want to withdraw?

Full account balance.

Partial withdrawal, net of tax, of \$  ,    ,    .

**Please note:** The minimum withdrawal amount is \$2,000.

Amount in words

## 3. How do you want your withdrawal to be paid?

- Your withdrawal will be paid at the unit price at the date of withdrawal. See [teamsuper.com/unit-pricing](https://teamsuper.com/unit-pricing)
- If you're withdrawing your full account balance and haven't met your minimum pension withdrawal amount for this financial year, we'll pay your pro-rated minimum payment within a fortnight of receiving this application, after which we'll process your total withdrawal.

Put an 'X' to show where you want your withdrawal to be paid:

**Pay to me.** Payment will be made by direct credit to the same account your regular pension payments are paid to. To change where your withdrawal is paid to, complete the **Update your pension details** form found at [teamsuper.com.au/resources](https://teamsuper.com.au/resources) and attach it to this application.

**Transfer to my super account with Team Super.** I've read and understood the **Super Product Disclosure Statement** from [teamsuper.com/pds](https://teamsuper.com/pds)

**Transfer to another fund.**

Other fund's full name

Other fund's address

Suburb

State

Postcode

Australian Business Number

Other fund Unique Superannuation Identifier (USI) number

Your other fund account or member number

## 4. If you're making a partial withdrawal, which investment option would you like to make your withdrawal from?

- Only fill in this section if you're invested in **more than one investment option**.
- If you don't make a choice or insufficient funds remain in your chosen investment option, the withdrawal will be taken from your chosen payment option first, then pro-rata across all your investment options.

### Lifecycle Investment Strategy

Lifecycle Investment Strategy	\$
<b>Pre-mixed investment options</b>	
High Growth	\$
Growth	\$
Balanced	\$
Moderate	\$
Indexed Defensive	\$
Defensive	\$
Secure	\$

### Asset class investment options

Australian Shares	\$
International Shares	\$
Property	\$
Bonds	\$
Cash	\$

Turn over to finish filling out this form...

## 5. Your declaration

- I declare the information I've provided is true and correct and agree for Team Super to pass on my payment details to the Australian Taxation Office (ATO) and any fund I've chosen to transfer my pension into as required by ATO reporting requirements.
- If I've asked to transfer my pension to a self-managed super fund, I confirm I'm a member and trustee or director of the fund's corporate trustee.
- I'm not a politically exposed person (PEP). Visit [teamsuper.com/pep](https://teamsuper.com/pep) for a definition. If you fall under the PEP definition, please call us on 13 64 63 or email [help@admin.teamsuper.com](mailto:help@admin.teamsuper.com)

**We need your certified identification to process this withdrawal.** For more information on certified identification, read our **How to prove your identity** factsheet at [teamsuper.com/resources](https://teamsuper.com/resources)

Mark 'X' in only one box.

I've previously provided certified identification to Team Super and acknowledge this identification is still current.

I'm providing certified identification with this form.

Your signature



Date (DD-MM-YYYY)

**When complete return this form to us by:**

**Post** Team Super  
Locked Bag 2020 Newcastle NSW 2300

Locked Bag 2020 Newcastle NSW 2300 | T 13 64 63 | [teamsuper.com](https://teamsuper.com)  
Team Superannuation Fund | ABN 16 457 520 308  
Team Super Pty Ltd (the Trustee) | ABN 70 003 566 989 | AFS licence 246864