

MyLife MyPension Application for Lump Sum Withdrawal

If you need help

For assistance call our Service Centre on **1300 963 720**.

Step 1 – Complete your personal details

Please print in black or blue pen,
in uppercase, one character per box.

A



Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other Date of birth / /

Given names

Surname

Residential address (must be provided)

Suburb State Postcode

Postal address (if different from above)

Suburb State Postcode

Daytime Telephone - Mobile -

E-mail

Membership number

Pension Type (select an option ☒)
☐ Retirement Pension
☐ Pre-Retirement Pension

Step 2 – Attach documentation if your personal details have changed

Name and Date of birth changes – see the *Proof of Identity* fact sheet on our website at www.mylifemypension.com.au/factsheets.

Address changes – attach a copy of a recent bill, mail item or driver's licence that displays your new residential or postal address.

If the required supporting documentation is not provided, the payment of your benefit will be delayed.





Step 3B – Provide payment instructions – Recontribution

Complete this section to recontribute your withdrawal as a non-concessional or spouse contribution back into the super account (within this fund) of you or your spouse.

Excess contributions tax may be payable if you exceed contribution limits.

(select an option ☒ below)

Option 1: Recontribute to your own account

☐ I declare I am under 65 or am aged 65-74 and have been in paid employment for at least 40 hours in a period of not more than 30 consecutive days during the financial year.

Subject to non-concessional contribution limits, I wish to recontribute to member number as a non-concessional contribution back into my account within this fund:

☐ **1A:** The full amount of withdrawal.

☐ **1B:** A partial amount of \$

OR

Option 2: Recontribute to your spouse's account

I have completed and attached a *Spouse Contribution Advice* form or *Making a One Off Personal Contribution* form. I wish to recontribute as a non-concessional contribution into my spouse's account within this fund:

☐ **2A:** The full amount of withdrawal as a:

☐ Spouse contribution

☐ Personal contribution

☐ **2B:** A partial amount of \$ as a:

☐ Spouse contribution

☐ Personal contribution

Step 4 – Select investment options for withdrawal

If your membership has more than one investment option, please indicate the investment option(s) and the amount you wish to withdraw from the option(s). If you don't specify any investment option or are currently invested in the Pension Default Strategy, we will deduct proportionally from each of your investments.

☐ Please make my withdrawal in the same proportions as my account balance

☐ Please make my withdrawal from the following options :

Managed Choice Options

Aggressive

Dollar (\$) amount

\$

Moderately Aggressive

\$

Balanced

\$

Conservative Balanced

\$

Moderately Conservative

\$

Conservative

\$

PositiveIMPACT

\$

RetirePlus

\$

RetireStable

\$

Build Your Own Options

Australian Shares

\$

Overseas Shares

\$

Property

\$

Diversified Fixed Interest

\$

FlexiTerm Deposit*

\$

Cash

\$

Total

Percentage to be withdrawn

%

%

%

%

%

%

%

%

%

%

%

%

%

%

%

%

* FlexiTerm Deposit is a closed investment option, however you can elect to withdraw funds from FlexiTerm Deposit if you are already invested in this option.



Step 5 – Change to Preservation Status

The preserved portion of your pension cannot be released to unpreserved status until one of the following conditions have been met:

- You are at least 60 years of age and have ceased employment since attaining age 60;

OR

- You have reached your preservation age*, have ceased employment and have permanently retired# from the workforce.

*Your preservation age depends on your date of birth – see the table below:

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

*Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations and **attach proof of age** to allow your benefit payment to be processed e.g. photocopy of your driver's licence, passport or birth certificate).

(select an option (✓))

- ☐ Yes, I have reached preservation age, ceased employment and permanently retired from the workforce.
- ☐ Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.
- ☐ Yes, I am at least 65 years of age.

Step 6 – Providing proof of your identity

Do you need to provide new certified proof of identity?

Please indicate (✓) if one of the following applies. If you tick one of the items below, you will need to provide new certified proof of identity.

- ☐ You have not provided certified ID previously
- ☐ You have changed your name (either your first or last name) – see below (under Name Change) for the list of specific documents required.
- ☐ Your date of birth was incorrect on our records and has been updated
- ☐ You have changed your bank account details

If you have ticked one of the items above, you will need to provide new certified proof of identity.


The easiest way to do this is as follows:

- photocopy both sides of your current drivers licence or passport
- take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post* or your local Police station**
- ask them to certify your ID.

* to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.

**a police officer, sheriff or sheriff's officer can certify your ID.

The person certifying your ID documents will include the following details on the copy:

	←	A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
	Certified true copy ←	Write or stamp 'certified true copy' of the original document
	J. Sample ←	The authorised person's signature
	Mr John Sample ←	Full name, qualification and registration number (if applicable) of the authorised person
	Justice of Peace ←	Date of certification (within 12 months of receipt)
	Registration No. 123456789 ←	
	Date: 01/02/2015 ←	

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at www.mylifemypension.com.au for a list of other people who can certify your ID document(s) and witness your statutory declaration.

Continued over



Step 6 – Providing proof of your identity (continued)

If you don't have a driver's licence or passport

You will need to provide a certified copy of one document from each of the following groups:

- | | | |
|---|------------|--|
| <ul style="list-style-type: none">• Birth certificate or birth extract¹• Citizenship certificate issued by the Commonwealth• Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits | AND | <ul style="list-style-type: none">• Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment• Tax Office Notice of Assessment issued in the last 12 months• Rates notice from local council issued in the last 3 months• Electricity, gas or water bill issued in the last 3 months• Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted) |
|---|------------|--|

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a marriage certificate, deed poll, decree nisi/divorce order or change of name certificate issued by the Births Deaths and Marriages Registration office.

¹ Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information and marketing material about the other products and services offered by us and our related bodies corporate. If you do not wish to receive marketing material, please contact us on **1300 963 720**.

Our Privacy Policy is available to view at mylifemypension.com.au/privacy or you can obtain a copy by contacting us on **1300 963 720**.

When you become a member, we assume that you consent to this handling of your personal information. If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policy lists all other relevant offshore locations.

Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 963 720** or write to our Privacy Officer, MyLife MyPension, GPO Box 4303, Melbourne VIC 3001.

Step 7 – Sign the form

By signing this form I:

- have read and understood this form
- understand that the information contained in this form will be handled by the Trustee to process my pension withdrawal
- acknowledge that if I've provided my email address details and/or mobile in this form, the Trustee may, at its discretion, use that email address and/or mobile to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature



Date

/ /

Please return your completed form to: MyLife MyPension, GPO Box 4303, Melbourne, VIC 3001.



Step 8 – Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.
Have you:

- ☐ Provided your member details in **Step 1**?
- ☐ Attached supporting documentation for any change of name and/or postal address detailed in **Step 2**?
- ☐ Provided complete payment instructions in **Step 3**?
- ☐ Signed and dated the form **Step 7**?
- ☐ Select the identification you have provided:
 - ☐ Current drivers' licence OR current passport; or
 - ☐ One document from list one and one document from list two. Further details provided on *Proof of Identity* fact sheet
- ☐ Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- ☐ Do your documents need to be certified? If so, ensure the certifier has included ALL of the following on each page:
 - ☐ Written or stamped 'certified true copy'
 - ☐ Signature and printed name
 - ☐ Date – the date MUST be within twelve months of the date we receive your completed form.
 - ☐ Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the *Providing proof of your identity* section for more details on how to certify a document and a list of valid certifiers.

