

# Withdrawal Form

Slate

Complete this form to apply to make a lump sum withdrawal from your Slate Super account or to transfer some or all of your account to another super fund.

You can find detailed information about Slate Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide, Financial Services Guide and Privacy Policy, all of which can be obtained from [www.slatesuper.com.au](http://www.slatesuper.com.au) or on request by phoning **02 8074 1772**.

This form may be posted to Slate Super **PO Box R1979, Royal Exchange NSW 1225** or scanned and emailed to [info@slatesuper.com.au](mailto:info@slatesuper.com.au).

**IMPORTANT:** Different forms apply for withdrawal requests because of **severe financial hardship, permanent incapacity or terminal medical condition**; or if you wish to participate in the **First Home Super Savers Scheme** or the **Trans-Tasman Portability Scheme**.

## 1. Personal Details

Given Name(s)	Surname		
Member Number	Date of Birth		
	DD	MM	YYYY
Mobile Phone Number	Email Address*		
Residential Address	City	State	Postcode

\* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can unsubscribe from our non-essential emails at any point or elect to receive communications by post by contacting Slate Super on **02 8074 1772** or via email at [info@slatesuper.com.au](mailto:info@slatesuper.com.au) or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

## 2. Tax File Number

Tax File Number

You can find your TFN on statements you've received from the ATO, your super fund, your work payment summary, or alternatively you can contact the ATO on 13 28 61 for help finding it. By providing your TFN you are giving Simple Choice Super permission to use your TFN for superannuation purposes. This includes creating and administering your account, accepting personal contributions into your account, using the ATO's SuperMatch service to find lost or inactive accounts in your name, and actioning your rollover requests.

Choosing not to provide your TFN is not an offence, but it may mean that you pay higher tax on your investment and we will not be able to accept some types of contributions from you. The lawful purposes for which your TFN can be used, and the consequences for not quoting your TFN, may change in the future, as a result of legislative changes. For more information, refer to the PDS or contact us on **02 8074 1772**.

### 3. Withdrawal Information

Please select **one** of the two options below.

Option 1 – Make a lump sum withdrawal from your account<sup>^</sup>

Do you wish to withdraw your entire account balance?<sup>#</sup>      Yes      No      If no, how much would you like to withdraw?<sup>\*</sup>      \$

<sup>^</sup>We are only able to action your lump sum withdrawal request if you meet a prescribed condition of release - see Section 4 below.

<sup>#</sup>If you withdraw your entire account balance any insurance cover you hold with Slate Super will cease and your account will be closed.

<sup>\*</sup>The amount specified above is a gross amount, and tax may be payable. You must leave at least \$200 in your account in order to remain a member of Slate Super.

Please specify your bank account details:

Account Name\*      Name of Financial Institution

BSB      Account Number

\* We can only make payments into an Australian bank, credit union or building society account that’s in your name or held jointly in your name with other person(s).

Option 2 – Rollover to another superannuation fund

Do you wish to rollover your entire account balance to another super fund?<sup>#</sup>      Yes      No      If no, how much would you like to rollover?<sup>\*</sup>      \$

<sup>#</sup>If you withdraw your entire account balance any insurance cover you hold with Slate Super will cease and your account will be closed.

<sup>\*</sup>You must leave at least \$200 in your account if you wish to remain a member of Slate Super.

Please specify the details of your new superannuation fund below:

Name of Fund      Fund USI

Fund Address      Fund ABN

Member Number

Is this a self-managed super fund?      Yes      No

\* If yes, please provide a **certified copy of the self-managed super fund’s bank statement** which is less than 12 months old.

## 4. Condition of Release

### A. Preservation age met

Only complete this section if you selected **Option 1 in Section 3 above**. Superannuation law requires that you must meet a condition of release to be eligible to withdraw your super. Please tick the box below which best describes your situation.

I have reached my preservation age\*, ceased employment and permanently retired# from the workforce.

I am at least 60 years of age and I have changed jobs or ceased gainful employment# since attaining age 60.

I am at least 65 years of age.

\* See the Preservation Age Table in the Slate Super Additional Information Booklet available at [www.slatesuper.com.au](http://www.slatesuper.com.au) or on request by phoning **02 8074 1772**.

# '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.

**B. If you are not eligible to make a withdrawal based on your age and retirement status, you may only use this form to access your super under one of the following conditions.**

Please tick the box below which best describes your situation.

I have applied for a **Departing Australia Superannuation Payment** which has been approved by the Australian Taxation Office.

I have applied for an **Early Release of Super on Compassionate Grounds** which has been approved by the Australian Taxation Office.\*

My account balance is less than \$200.

\* Please provide a certified copy of the **ATO Letter of Approval**.

**IMPORTANT:** If you are seeking to withdraw your super by means of early release of super due to **Severe Financial Hardship, Permanent Incapacity**, or a **Terminal Medical Condition**; or if you wish to participate in the **First Home Super Savers Scheme** or the Trans-Tasman Portability Scheme, please contact us at [info@slatesuper.com.au](mailto:info@slatesuper.com.au) or on **02 8074 1772**. This form cannot be used to release the funds to you.

If you do not meet a condition of release and your account balance is in excess of \$200, your funds will be preserved and unable to be released until such a condition is met.

## 5. Verification of Identity

Please select **one** of the two options below.

### Option 1 – I want to attach paper copies of certified ID

You must provide photocopies of **at least two** of the following - Australian Passport, Australian Drivers Licence, Medicare Card. Each page must be correctly certified as a true copy. For more information, see the **Providing Certified Identification Factsheet** available at [www.slatesuper.com.au](http://www.slatesuper.com.au) or on request by phoning **02 8074 1772**.

If the documents you provide are not correctly certified or are unable to be read, you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party id validation provider, including confirming your document is valid with the original document issuer.

### Option 2 – I want to use electronic verification

By providing the information below, you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party id validation provider, including confirming your document is valid with the original document issuer.

You must provide **at least two** of the following (if you are unable to provide this information you will need to provide certified ID as per option 1):

#### **Australian Passport** Please complete the details exactly as they appear on your Passport

Passport Number  Date of Birth    Gender

Given Name(s)  Surname

#### **Medicare Card** Please complete the details exactly as they appear on your Medicare Card

Card Number  Reference Number  Card Expiry Date

Given Name(s)  Surname

Date of Birth

#### **Australian Drivers Licence** Please complete the details exactly as they appear on your Licence

Licence Number  State of Issue

Given Name(s)  Surname

Date of Birth    Card Number

## 6. Declaration and Signature

By completing this form, I declare that:

- All the details I have provided are true and correct.
- I have read and understood the Slate Super PDS and all related documents applicable to this rollover.
- I have read the Privacy Statement (below) and understand how Slate Super will use my personal information.
- 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.
- I acknowledge that the Trustee cannot provide me with financial advice about the consequences of withdrawing my benefit and that I should consult an appropriately qualified adviser for such advice.

Signature

Print name

Date

DD	MM	YYYY
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**PRIVACY STATEMENT:** By signing this form you consent to Slate Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund’s Administrator, the Fund’s Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. To access your personal information or for a copy of our Privacy Policy, visit [www.slatesuper.com.au](http://www.slatesuper.com.au), phone **02 8074 1772** or email us at [info@slatesuper.com.au](mailto:info@slatesuper.com.au).