

Quadrant Investment Choice and Quadrant Personal Super members only.

### Privacy

Information on this form will be used to process your superannuation payment. Quadrant is committed to ensuring the privacy and confidentiality of your information. When paying your benefit it may be necessary for us to disclose your personal information to certain third parties. By signing this form you consent to your information being handled in this way. Please refer to our *Member Guide* for more information.

## Personal details

Title:  Mr  Mrs  Ms  Miss  Dr      Member number:

Given names:

Surname:

Postal address:

Suburb:

State:       Postcode:

Date of birth:       Phone (home): (  )

Phone (work): (  )       Phone (mobile):

Email address:

Employer:

## Reason for requesting payment:

- |  |   |
|--|---|
| <input type="checkbox"/> Withdrawal                                  | <input type="checkbox"/> Retrenchment/redundancy                            |
| <input type="checkbox"/> Rollover                                    | <input type="checkbox"/> *Ill health/Disablement                            |
| <input type="checkbox"/> Retirement                                  | <i>*Subject to preservation requirements or two medical certificates</i>    |
| <input type="checkbox"/> Resignation                                 | <input type="checkbox"/> Temporary resident permanently departing Australia |
| <input type="checkbox"/> Other (please specify) <input type="text"/> |   |

## Over age 55?

### Retirement declaration

To be completed by members wishing to access preserved benefits.

- I am 55 years of age or more and have been gainfully employed and have ceased employment, and I intend never to return to gainful employment.
- I am 60 years of age or more and have been gainfully employed and have ceased that employment since attaining the age of 60.

Do you have a financial advisor?       Yes       No

Financial advisor/s name:

Financial advisor/s company:

Phone: (  )       Fax: (  )

Email address:

I authorise my financial advisor to receive all information regarding my superannuation.

## Please complete the following sections if you would like to:

- Make a cash withdrawal from your account (complete sections 1, 4 and 5)
- Take some cash and rollover the balance to other fund (complete sections 1, 2, 4 and 5)
- Rollover to another fund (complete sections 2, 4 and 5)
- Rollover to a Quadrant Super Pension (complete sections 3, 4 and 5)
- Take some cash and rollover the balance to a Quadrant Super Pension (complete sections 1, 3, 4 and 5)

### 1. Make a cash withdrawal

Your preserved superannuation cannot be taken in cash unless you meet certain criteria. The amounts shown on your superannuation lump sum pre-payment summary represents the value of your account on the day the summary was prepared. The value of the benefit actually paid to you may be higher or lower than that amount. Please refer to the *Member Guide* for more information.

#### Payment details

Please select from the following options:

#### I want to withdraw:

- My total cash benefit (unrestricted non-preserved)  
**OR**  
 An amount of \$   Before tax **OR**  After tax

#### Paid by:

- Cheque **OR**  Direct credit into my bank account  
*(please note you can only nominate a bank account that is held in your name)*

Name of Australian financial institution:

Branch name:

Branch number (BSB):

Account number:

Account name:

### 2. Rollover to another fund

Rollover fund name:

Fund address:

Suburb:

State:

Postcode:

Australian Business Number (ABN):

Superannuation Fund Number (SPIN):

Policy/member number:

Amount:  Full balance **OR**  Please specify amount \$

Is this a Choice of Fund election?  Yes  No

*If yes, please note that you must maintain a minimum balance of \$5,000 in your Quadrant Superannuation account while your current employer confirms future contributions may be paid to Quadrant and that you can only request one transfer within a 12 month period.*

### 3. Rollover to a Quadrant Super Pension

To become a member of the Quadrant Super Pension you must meet the legislative requirements. You generally need to have reached your preservation age or have become totally and permanently disabled.

You will need to speak with a financial advisor who will assist you through the set up of your account including the investment options, any tax issues and your pension payments. The advisor will oversee the completion of all required paperwork contained in our *Member Guide*.

- I would like to commence a Quadrant Super Pension and have attached a completed *Quadrant Super Pension application form* plus any other required forms as stated in the *Member Guide*.

OR

- I would like a Quadrant First financial advisor, AFSL no. 284443, to assist me with the set up of a Quadrant Super Pension. *We will contact you as soon as possible to arrange an appointment.*

### 4. Proof of identity

You will need to provide documentation with this *super payment instruction form* to prove you are the person to whom the superannuation entitlements belong. Please refer to page 4 for more information about providing proof of identity.

- I have attached a certified copy of my drivers license or passport

OR I have attached certified copies of **both**

- Birth/Citizenship certificate or Centrelink pension card **AND**  
 Centrelink payment letter or Government notice (less than one year old) with my name and address

### 5. Sign and date

I authorise my benefit to be paid as instructed on this *super payment instruction form*. I authorise the Quadrant Trustee to determine the tax treatment of my benefit unless I specify otherwise. I authorise any differences in my final benefit to be paid in the same proportions as my instruction. I declare that the information given is true and correct. I consent to the use of my personal information as outlined in Quadrant's privacy policy which is available on the Quadrant website at [quadrantsuper.com.au](http://quadrantsuper.com.au).

Your Signature:

Date:

January 2010

## PROVIDING PROOF OF IDENTITY

### Identification requirements

This form requires you to provide proof of identity before it can be processed.

You will need to supply us with certified identification documents. To do this, take the original identification documents and a photocopy of both sides of the original document to an authorised person (see list at right).

Copied, faxed or scanned copies of certified documents do not comply with our identification requirements, and are not acceptable.

### How a document is certified

The authorised person will need to:

- write or stamp in English on the photocopies, words to the effect of: 'This is a true and correct copy of the original', and
- write their name, qualification/position (e.g. Justice of the Peace, Police Officer etc), company name, years of service and sign and date.

Please note that the certification of your documents must not be older than 30 days.

### Identification documents required

If you cannot supply a document from list 1 below, you must supply one document from list 2 and one from list 3.

#### One document from list 1

- |          |   |
|----------|---|
| <b>1</b> | <ul style="list-style-type: none"> <li>• a certified copy of a current driver's licence or</li> <li>• a certified copy of a current passport</li> </ul> |
|----------|---|

OR

#### One document from list 2

- |          |   |
|----------|---|
| <b>2</b> | <ul style="list-style-type: none"> <li>• a certified copy of birth certificate or birth extract or</li> <li>• a certified copy of citizenship certificate issued by the Commonwealth of Australia or</li> <li>• a certified copy of pension card issued by Centrelink that entitles the person to financial benefits</li> </ul> |
|----------|---|

#### AND one document from list 3

- |          |   |
|----------|---|
| <b>3</b> | <ul style="list-style-type: none"> <li>• a certified copy of letter from Centrelink regarding a Government Assistance payment or</li> <li>• a certified copy of Notice issued by Commonwealth State or Territory Government or local council within the last 12 months that contains your name and residential address e.g. Australian Tax Office Notice of Assessment or rates notice from local council.</li> </ul> |
|----------|---|

### Authorised persons

Identification papers must be certified by an authorised person.

- A police officer
- A finance company officer with five or more years of continuous service (with one or more finance companies)
- 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 officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A permanent employee of Australia Post with five or more years of continuous service
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, such as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of a court
- A magistrate or
- A Chief Executive Officer of a Commonwealth Court.

### Certified linking documents

Copies of 'certified linking documents' will be required in the case of name change, or if the applicant is signing on behalf of another person.

**Change of name** - Marriage Certificate, deed poll or Change of Name Certificate from Births, Deaths and Marriages Registration Office.

**Signing on behalf if applicant** - Guardianship papers or Power of Attorney.

### Contact us

All completed forms and certified documents should be sent to:

Quadrant Superannuation Pty Ltd  
Reply Paid 863  
Hobart TAS 7001