

# Withdraw your super

## Triple S / Flexible Rollover Product / Income Stream / Super SA Select

Please complete this form in **BLOCK LETTERS** using a **BLACK PEN** and return the signed original form to Super SA.

To find out more visit [supersa.sa.gov.au](https://supersa.sa.gov.au) or call (08) 8214 7800.

Use this form if you wish to access all or part of your benefit as a cash payment to you.

**Client ID:**

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### 1. Personal details

Title	Given Name(s)	Date of birth							
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Name	<input type="text"/>								
Email address*	<input type="text"/>								
Mobile phone*	Work phone*	Home phone*							
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>								
Suburb	State			Postcode					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address (if different from above)	<input type="text"/>								
Suburb	State			Postcode					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

\*By providing your email address and/or telephone number(s) you are agreeing to receive, from Super SA, or an organisation on behalf of Super SA, marketing communications including newsletters, announcements, invitations or surveys. You may opt out of these marketing communications at any time by updating your communication preferences in our online member portal or by contacting Super SA. If you opt out of marketing communications, you will still receive important account information from us.

### 2. Tax File Number (TFN)

Tax File Number

Providing your TFN will ensure that your entitlement is taxed concessionally. If you choose not to provide your TFN, part of your entitlement may be taxed at the highest marginal rate. Declining to provide your TFN is not an offence.

### Checklist

Before Super SA can process your payment you need to complete all sections on this form and provide all requested information.

- |  |  |
|--|--|
| <input type="checkbox"/> I have completed my personal details (Section 1).   | <input type="checkbox"/> I have attached a copy of my most recent bank account statement (Section 5) (if applicable).  |
| <input type="checkbox"/> I have supplied Super SA with my tax file number (TFN) (Section 2).                       | <input type="checkbox"/> I have indicated which investment option(s) the payment will come from (Section 6), (Income Stream & Flexible Rollover Product (FRP) investors only). |
| <input type="checkbox"/> I have indicated my release conditions (Section 3).                                       |  |
| <input type="checkbox"/> I have nominated which scheme and the amount my withdrawal will be paid from (Section 4). | <input type="checkbox"/> I have provided the required proof of identity documents that have been certified within the last six months (Section 7).                             |
| <input type="checkbox"/> I have provided my bank account details for my payment (Section 5).                       | <input type="checkbox"/> I have signed the Member Declaration (Section 8).   |

**Note:** If you are unsure what benefit is available, please contact Super SA to confirm to avoid delays in processing your request.

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### 3. Release Conditions

For Super SA to release a payment to you, you need to meet a condition of release. This may depend on the different schemes you hold.

Please tick one box below based on your current age:

Aged under 55	Aged between 55 – 59	Aged between 60 – 64	Aged over 65
<input type="checkbox"/> I wish to access my unrestricted non-preserved entitlement. <i>Triple S members - For your entitlement to be paid under this circumstance, your application must be received within 3 months of your resignation.</i>	<input type="checkbox"/> I wish to access my unrestricted non-preserved entitlement.	<input type="checkbox"/> I wish to access my unrestricted non-preserved entitlement.	<input type="checkbox"/> I am aged over 65
<input type="checkbox"/> I have \$200 or less in my account.	<input type="checkbox"/> I have reached my Commonwealth Preservation Age and permanently retired from the workforce.	<input type="checkbox"/> I have reached my Commonwealth Preservation Age and permanently retired from the workforce.	
<input type="checkbox"/> I ceased employment on the grounds of invalidity. <i>(Triple S and FRP only, additional information maybe requested to assess your withdrawal)</i>	<input type="checkbox"/> I am under Commonwealth Government preservation age and have ceased employment on the grounds of invalidity. <i>(Triple S and FRP only, additional information maybe requested to assess your withdrawal)</i>	<input type="checkbox"/> I have ceased an employment arrangement after the age of 60.	
<input type="checkbox"/> I declare that my Temporary Resident Visa has expired or been revoked and I am leaving or have left Australia to permanently reside overseas and I wish to have my total entitlement paid directly to me. <i>(Please also complete a Departing Australia Superannuation Payment (DASP) online application, available on the Australian Taxation Office website at <a href="http://www.ato.gov.au">www.ato.gov.au</a>.)</i>	<input type="checkbox"/> I declare that my Temporary Resident Visa has expired or been revoked and I am leaving or have left Australia to permanently reside overseas and I wish to have my total entitlement paid directly to me. <i>(Please also complete a Departing Australia Superannuation Payment (DASP) online application, available on the Australian Taxation Office website at <a href="http://www.ato.gov.au">www.ato.gov.au</a>.)</i>		
SA Police Triple S members only – (must complete in addition to the above) <input type="checkbox"/> I ceased employment with SA Police at or after age 50.			

Your Commonwealth Government preservation age depends on your date of birth. If you were born before 30 June 1964, you have already reached your preservation age. For those born after 30 June 1964, the preservation age is 60.

**Important note:** Commonwealth preservation rules are different from preservation rules in Triple S. You need to be aware of this if you are rolling money out of Triple S.

### 4. Your scheme

Please select which scheme you would like to take an entitlement and the amount:

**TRIPLE S MEMBERS**

**Account ID:**

**Important!**

There could be disadvantages with taking payments directly from Triple S before you transfer to another product (like our Flexible Rollover Product) as the withdrawal is generally deemed as assessable income, which could result in additional taxes or other adverse effects. You should seek advice from your accountant or financial adviser before completing this form.

*TRIPLE S is an untaxed scheme, for more information including untaxed limits & tax rates on withdrawals please refer to the Triple S Reference Guide on the website.*

Pay \$  directly to me (select one)  Before Tax  After Tax

Maintain my minimum account balance and pay the maximum available amount directly to me.

Pay my full benefit directly to me and close my account

Each partial withdrawal must be \$1,000 or more, which are limited to one per financial year. The amount remaining in the fund must be greater than \$6,500 (or greater than \$25,000 for Operational SA Ambulance employees and active Police Officers).

Please tick this box if you are no longer employed within the SA public sector.

# Withdraw your super



Super SA



## Triple S / Flexible Rollover Product / Income Stream / Super SA Select

Please complete this form in **BLOCK LETTERS** using a **BLACK PEN** and return the signed original form to Super SA.

### 4. Your scheme selection (continued)

Please select which scheme you would like to take an entitlement and the amount:

#### Triple S spouse accounts only (must complete)

Spouse entitlements can only be paid using this form when one of the following events have occurred:

- My spouse has ceased SA public sector employment and I have reached preservation age.  I am no longer the spouse of the Triple S member and I have reached preservation age.
- My spouse is no longer a member of Triple S or Super SA Select and I have reached preservation age.  I have reached 65 years of age.

**Important Note:** Please call Super SA if you have Surcharge liability before submitting this application. To retain funds within your Triple S account for payment of your surcharge liability please complete this section and attach a copy of the relevant notice of assessment from the ATO to this form.

Retain \$ \_\_\_\_\_ in the Triple S scheme for payment of my surcharge liability when it becomes due.

#### FLEXIBLE ROLLOVER PRODUCT INVESTORS

Account ID: \_\_\_\_\_

Pay \$ \_\_\_\_\_ directly to me (select one)  Before Tax  After Tax

Maintain my minimum account balance and pay the maximum available amount directly to me.

Pay my full benefit directly to me and close my account.

**Each partial withdrawal must be \$1,000 or more and is subject to Commonwealth preservation rules.**

**If your balance is below \$6,500**

- You can make one withdrawal each financial year (you can subsequently request a full payment and close your account).
- The amount remaining in the Flexible Rollover Product must be at least \$1,500.

**If your balance is \$6,500 or more**

- There is no limit on the number of withdrawals you can make.
- The amount remaining in the Flexible Rollover Product must be at least \$6,500.

#### INCOME STREAM INVESTORS

Account ID: \_\_\_\_\_

Pay \$ \_\_\_\_\_ directly to me (select one)  Before Tax  After Tax

Pay my full benefit directly to me and close my account.

**Each partial withdrawal must be \$1,000 or more and is subject to Commonwealth preservation rules.**

**The amount remaining in the fund must be greater than \$1,500.**

**Tax is only payable for members under the age of 60.**

#### SUPER SA SELECT

Account ID: \_\_\_\_\_

Pay \$ \_\_\_\_\_ directly to me (select one)  Before Tax  After Tax

Maintain my minimum account balance and pay the maximum available amount directly to me.

Pay my full benefit directly to me and close my account.

**Each partial withdrawal must be \$1,000 or more.**

**The amount remaining in the fund must be greater than \$6,500 (or greater than \$25,000 for Operational SA Ambulance employees and active Police Officers).**

Please tick this box if you are no longer employed within the SA public sector.

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### 5. Payment details

Where would you like us to pay your Entitlement?

Bank Details (please attach a copy of your most recent bank statement)

Account name (account holder name)


BSB number

				-				
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Account number

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#### INCOME STREAM INVESTORS ONLY

Make this payment to the account I have already provided to Super SA for my regular income payments.

### 6. Where is the payment coming from? (FRP & Income Stream Only)

Which investment option(s) would you like your payment to come from?

Write the percentage you want to withdraw from each investment option below using whole percentages:

High Growth	<input type="text"/>	%	Moderate	<input type="text"/>	%	Cash	<input type="text"/>	%
Socially Responsible	<input type="text"/>	%	Stable	<input type="text"/>	%	<b>TOTAL</b>	<b>= 100</b>	<b>%</b>
Balanced	<input type="text"/>	%	Capital Defensive	<input type="text"/>	%			

If you leave this section blank, FRP withdrawals will be redeemed in proportion to the balance held in each investment option and Income Stream withdrawals, as per your current draw down order for regular payments.

Withdrawals from Triple S or Super SA Select will be withdrawn in proportion to the balance of each investment option at the time of withdrawal.

### 7. Proof of identity

If you are applying for all or part of your entitlement to be paid directly to you, you must provide us with certified Proof of Identity together with your application.

Super SA must be able to verify your name and either your date of birth or your residential address from an original document, a certified copy or a certified extract from an original copy.

Documents may be either:

- a primary photographic identification document (such as a current driver's licence or Australian passport), or
- both a primary non-photographic identification document (such as a birth certificate or citizenship certificate) and a secondary identification document (such as a Tax Notice Assessment or council rates).

Documents must have been certified within the last six months by authorised persons such as a Justice of the Peace or a police officer.

If you would like to provide original documents please bring them to the Super SA Member Centre. We will sight the documents and take a photocopy for our records and return the originals to you immediately.

If you are overseas, you need to have your documents certified by an Australian consular officer, an Australian diplomatic officer or you should contact Super SA for alternative arrangements.

For more information see the Proof of Identity information sheet, available on the Super SA website.

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Super SA



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### 8. Member declaration

- I acknowledge that Super SA may verify my details with the ATO (Australian Tax Office) in order to process this request.
- I declare that the information I have provided on this form is true and correct and understand that:
  - Once my payment has been made I will not be able to change my instructions.
  - By closing my Triple S, Super SA Select or FRP account in full all insurance held will cease.
  - The unit price used to calculate my payment is the unit price at, or immediately prior to, the date of processing the payment.
  - I understand that Super SA does not accept responsibility for rejection or delays in payments due to incorrect account details being provided.

#### Casual Triple S employee declaration

- I understand that if I am a casual employee who worked nine or more hours per week, I am taken to remain in employment for a period of 12 months after the last time I performed work for the SA public sector.
- Where I close my account I understand that by signing this declaration I am confirming that I have ceased employment with the SA public sector and this is a notice to the Board to cease the 12 month period from the date of signing this declaration.
- I understand that by signing this declaration I am terminating my membership with Triple S and any Total and Permanent Disablement and/or Death Insurance and Income Protection Insurance will be cancelled from the date of signing this declaration.

Signature

Date

**Important:** Before making withdrawals from your scheme, you should ensure you have read the relevant Product Disclosure Statement (PDS) and Reference Guide available on Super SA's website, and strongly consider seeking financial advice as some withdrawals can have tax consequences and/or impact government benefits.

Contact us



**EMAIL** [supersa@sa.gov.au](mailto:supersa@sa.gov.au), or



**POST** GPO Box 48, Adelaide SA 5001



**WEBSITE** [supersa.sa.gov.au](http://supersa.sa.gov.au)



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