

Application for Transition to Retirement

Lump Sum

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** with a copy of the Transition to Retirement (Superannuation) Agreement approved by your agency and return to Super SA via post or email.

To find out more visit supersa.sa.gov.au or call **(08) 8214 7800**

Super ID:

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Important If you have ceased employment with the public sector and wish to apply for the release of your entitlements, do not complete this form. Instead, you need to complete the Application for Payment form.

- Once your entitlement is rolled over to a complying income stream fund, the "Taxable (untaxed) component" of the entitlement will be taxed at 15%.
- When considering Transition to retirement (TTR) we strongly suggest you seek financial advice.

1. Personal details

Title					Date of birth							
					D D / M M / Y Y Y Y							
Given Name(s)												
Family Name												
Email address*												
Mobile phone*				Work phone				Home phone				
Street address												
Suburb							State			Postcode		
Postal address (if different from above)												
Suburb							State			Postcode		
Name of agency							Employee number					

*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.

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 confirmed that I am eligible for TTR (section 3). |
| <input type="checkbox"/> I have attached a copy of the Application for Transition to Retirement (Superannuation) Arrangement form approved by my line manager and agency delegate. | <input type="checkbox"/> I have supplied Super SA with my Tax File Number (TFN) (section 2). |
| <input type="checkbox"/> I have provided my payment details (section 4). | <input type="checkbox"/> I have signed the Member Declaration (section 5). |
| | <input type="checkbox"/> My agency's pay office has completed the Salary Certificate on this form (sections 6 & 7). |

2. Tax file number (TFN)

Tax File Number

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

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Super SA



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3. Transition to Retirement Eligibility

TTR benefits cannot be paid unless you meet all of the following conditions (please confirm):

- I have reached age 60. I am continuing to work
- I have entered into a Transition to Retirement Agreement with my agency and I have attached a copy of the approved agreement to this form I will be rolling over to a non-commutable income stream product.

4. Payment Details

I wish to transfer the following TTR benefit from my Lump Sum Scheme account:

The maximum drawdown benefit that I am entitled to under the TTR arrangements (this is based on the percentage reduction to my salary as a result of the TTR arrangement)

\$ **! Please note:** The amount requested cannot exceed the maximum drawdown benefit, and if you are rolling over to a Super SA Income Stream, you must rollover a minimum of \$30,000. Contact Super SA if you are not sure what your maximum drawdown benefit is.

TTR payments must be forwarded directly to the complying non-commutable income stream fund nominated below.

Super SA Income Stream
(Please also complete an Application to Purchase form available in the Super SA Income Stream PDS.)

The non-commutable income stream fund named below:
Name of rollover fund
Member number Fund ABN
Rollover fund USI

If you wish to roll over your entitlement to more than one fund, please attach the relevant documentation to this application.
! Note: If we are unable to verify that the rollover super fund is a complying non-commutable income stream fund, we will require you to provide a letter of compliance.

I wish to transfer to my Self Managed Super Fund (SMSF)
Name of SMSF
SMSF ABN Electronic Service Address (ESA)
SMSF bank details (please attach a copy of your most recent SMSF bank statement)
Account name
BSB number Account number

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5. Member declaration

- I certify that the details are true and correct.
- I understand that once my payment has been made I will not be able to change my instructions.
- I understand that by receiving a TTR benefit the benefit remaining in the Lump Sum Scheme will be reduced accordingly.

Signature

Date / /

6. Salary Certificate (to be completed by your payroll section)

Member name

Occupation

Name of Agency

Pre-TTR details

Position immediately prior to TTR agreement

Classification

Fortnightly full time salary

\$

Effective from

/ /

Current fraction of time

% (show 100% if full time)

Post-TTR details

Position post-TTR agreement

Classification

Fortnightly full time salary

\$

Date TTR agreement effective

/ /

Fraction of time

% (show 100% if full time)

Was the contributor in receipt of higher duties allowance in an Acting position prior to or following the TTR agreement?

No Yes, please provide details

7. Certification (by authorised officer)

I certify that the member named within this application has entered into a TTR agreement and that this information contained within this Salary Certificate is correct.

Name of authorised officer (please print)

Contact telephone number

Signature

Date / /

Contact us

EMAIL supersa@sa.gov.au

WEBSITE supersa.sa.gov.au

POST GPO Box 48, Adelaide SA 5001

PHONE (08) 8214 7800

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Ground floor, 151 Pirie St Adelaide SA 5000
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