## Application for payment of a preserved lump sum entitlement





### Pension

**Super ID:** 

account information from us.

Tax File Number

2. Tax file number (TFN)

Please complete all the details on this form in BLOCK LETTERS using a BLACK PEN and return to Super SA via post or email.

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

1. Personal detai	its	Date of birth	/ Y Y Y
Given Name(s)			
amily Name			
mail address*			
Nobile phone*	Work phone	Home phone	
treet address			
uburb		State	Postcode
ostal address (if different from abov	/e)		
uburb		State	Postcode

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Providing your TFN will ensure that your entitlement is taxed concessionally. 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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3. Type of entitlement applied for				
Retirement of I advise that  I have permane I wish to (Please of In accordate entitlement preserved your Comment of I wish to the I wish to th	• •	I wish to roll over my entitlement into the Super SA Income Stream (minimum amount \$30,000).  Please note: to purchase the Super SA Income Stream you must generally also have reached age 60.  (Please also complete an Application to Purchase form available in the Super SA Income Stream PDS.)  I wish to roll over my entitlement into the Super SA Flexible Rollover Product (minimum amount \$1,500).  (Please also complete an Application to Purchase form available in the Super SA Flexible Rollover Product PDS.)  I wish to roll over my entitlement into another complying super fund. (Please complete section 5.)  I wish to roll over part of my entitlement into another complying super fund and receive the balance (net of tax).		
Super fund and receive the balance (net of tax).  (Please provide the required proof of identity documents and complete section 4 & 5)  Other entitlement  I advise that I am under age 55 and:  I wish to roll over my entitlement into the Super SA Flexible Rollover Product (minimum amount \$1,500).  (Please also complete an Application to Purchase form available in the Super SA Flexible Rollover Product PDS.)  I wish to roll over my entitlement into another complying super fund. (Please complete section 5.)  I wish to apply for my entitlement on the grounds of DISABILITY.  You must also complete a Claim for Disablement Entitlements form.  You are responsible for any doctor's fees charged for the completion of the medical report section of the Claim for Disablement Entitlements form.  If you are intending to roll over your entitlement please complete section 5.  If you are applying for all or part of your entitlement to be paid directly to you then please provide the required proof of identity documents and complete section 4.				
4. Payment Details				

# 4. Payment Details Complete this section if you wish to have all or part of your entitlement paid directly to your bank account. Name of financial institution Branch Account name (account holder name) BSB number (compulsory) Account number When completing your account details, please use numbers only. Characters and symbols will not be recognised. For more information, contact your financial institution.

### ( Important

We require you to provide a bank statement for the account your benefit will be paid to (e.g. printed statement or online statement from a bank or credit union). These statements need to be current (i.e. less than 12 months old) and must show your BSB, account number and your full name on the account.

**Please note** payments cannot be made to third party accounts, credit cards or overseas accounts. Super SA does not accept responsibility for rejection of transfer due to incorrect account details being provided by you.

There could be disadvantages with taking payments directly from the Pension Scheme 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. The Pension Scheme is an untaxed scheme, for information about tax rates refer to the **Pension and Lump Sum Tax information sheet**.

# Application for payment of a preserved lump sum entitlement



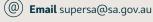


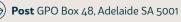
## -Pension

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

5. Request to roll over an entitlement into another complying super fund Please complete this section if you want to roll over any part of your entitlement into another complying super fund. All rollover payments will be forwarded direct to the fund you nominate below:				
I wish to transfer to the Super fund named below:				
Name of rollover fund				
New policy/member number	Rollover fund ABN			
Rollover fund USI				
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 Account number				
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 fund, we will require you to provide a letter of compliance.				
Rollover payment details				
Amount to be rolled over \$	Amount to be paid to bank account \$			
<b>6. Member declaration</b> I certify that the details above are true and correct. I understand that once my payment has been made I will not be able to change my instructions.				
Signature 🗶	Date D D / M M / Y Y Y			

#### Contact us







Website supersa.sa.gov.au



(%) Phone (08) 8214 7800



Member Centre, Kaurna Country Ground floor, 151 Pirie St Adelaide SA 5000 (Enter from Pulteney Street).