

Application for Early Release of Superannuation Benefits - Compassionate Grounds



Note: Only Australian or New Zealand citizens or permanent residents of Australia are permitted to claim for the early release of preserved superannuation benefits on compassionate grounds.

This form can be used to arrange a payment from your Freedom of Choice account **after** the ATO has approved the early release of your benefit on specified compassionate grounds.

The ATO is responsible for assessing all requests for early release of benefits on specified compassionate grounds. Freedom of Choice is responsible for the payment of the benefit from the fund. If you have not yet applied to the ATO for assessment, you must do so before completing this form. You can apply online at www.ato.gov.au or call the ATO on 13 10 20 to request an application form.

Generally, you can apply for the early release of superannuation benefits on specified compassionate grounds if you need:

- treatment and transport for you or a dependant concerning life threatening illness or injury, acute or chronic pain, or acute or chronic mental disturbance; OR
- the modification of your home or motor vehicle if you or a dependant has a severe disability; OR
- palliative care for you or a dependant, or the death, funeral, or burial of a dependant; OR
- mortgage payments to prevent your bank or lender selling your home.

The ATO will assess your application and write to you with their decision. If the ATO approves the early release of your benefit, please send the following documents to Freedom of Choice:

1. ATO letter of approval of the early release of your benefit
2. this application form (completed)
3. proof of identity documents (see below)

Proof of identity documents

Either

A certified[^] copy of one of the following documents:

- current Australian state/territory driver's license with your photograph
- Australian passport
- card issued under a state or territory for the purpose of providing a person's age containing a photograph of the person
- foreign passport or similar travel document containing a photograph and the signature of the person*

Or

One certified[^] document from this list:

- an Australian birth certificate or extract issued by a state or territory
- a citizenship certificate issued by the Commonwealth
- a current Centrelink pension card that entitles you to receive financial benefits

And

One certified[^] document from this list:

- a notice issued by the ATO within the last 12 months that shows your name and current residential address and the provision of financial benefits to the individual e.g. your last tax return
- a notice issued by a local council or utilities provider in the last 3 months e.g. rates notice, electricity or water bill
- a notice issued by Commonwealth, state or territory government within the last 12 months showing your name and current address e.g. Centrelink letter

* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

[^] Document must have original certification on it. It cannot be a photocopy of a document that was previously certified.

CHECKLIST

- ☐ ATO letter of approval of the early release of your benefit
- ☐ this application form (completed)
- ☐ proof of identity documents

SECTION 1: PERSONAL DETAILS

Full Name:

Address:

Date of Birth:

Member Number:

Daytime Contact Number:

SECTION 2: PAYMENT DETAILS

Please provide your bank account details below:

Account Name*:

* Must be held in your name or jointly in your name.

Name of bank or financial institution:

Branch:

BSB:

Account Number:

SECTION 3: WITHDRAWAL DETAILS

Please select one of the withdrawal options below:

☐

Total amount approved by the ATO

☐

Nominated amount

\$

Note: You'll need to ensure there is enough money in your Freedom of Choice account to pay for any insurance premiums to maintain your insurance cover (if any). If you nominate an amount less than what the ATO has approved, no additional payment will be made at a later date.

SECTION 4: DECLARATION

- I do solemnly and sincerely declare that the information provided by me in this Early Release Application Form is true and correct.
- I also declare that I am unable to meet my reasonable and immediate family living expenses and that I do not have any assets (apart from my home) which could (reasonably and realistically speaking) be used or sold to cover this gap.
- I also declare that the amount I am requesting to be released is necessary to meet this reasonable and immediate family expense.
- I make this solemn declaration by virtue of the Statutory Declaration Act 1959 as amended and subject to the penalties provided in that Act for the making of false statements in the statutory declarations, conscientiously believing the statements contained in the declaration to be true in every particular.

Signature of Member:

Date:

Full Name of Member:

Please return this completed form to Freedom of Choice PO Box 3528, Tingalpa DC Qld 4173

Phone: 1800 806 013 Fax: (07) 3899 7299 Email: enquiries@freedomofchoice.com.au Website: www.freedomofchoice.com.au

We are committed to respecting the privacy of the personal information you give us.

Our formal Privacy Statement sets out how we do this. If you would like a copy of the Freedom of Choice Privacy Statement, please let us know. We have published our Privacy Statement on our website www.freedomofchoice.com.au