

Withdrawal Advice

Portfolio Service



Please complete this form in **BLOCK LETTERS** using **BLACK** or **BLUE** pen only.

Account number

Section 1 – Investor Details

Investor name(s) or Company/Trustee name <i>if applicable</i>					
<input type="text"/>					
Date of birth <i>if applicable</i>		Contact email			
<input type="text"/> / <input type="text"/> / <input type="text"/>		<input type="text"/>			
Contact telephone		Contact mobile		Fax	
<input type="text"/>		<input type="text"/>		<input type="text"/>	
Residential address			Previous address (if this is the address held by the Service)		
<input type="text"/>			<input type="text"/>		
Suburb		State	Postcode		
<input type="text"/>		<input type="text"/>	<input type="text"/>		<input type="text"/>
Postal address (<i>all account correspondence will be sent to this address</i>)			Suburb		State
<input type="text"/>			<input type="text"/>		<input type="text"/>

Section 2 – Payment Amount

Please specify payment amount (✓) Full withdrawal Partial withdrawal of \$

In the case of a partial withdrawal request, a sell down of investments will be required and if we have not received instructions from you, we will sell down assets in accordance with our default sell method.

Section 3 – Payment Instructions

Please pay proceeds of the withdrawal request into the following account:

Bank/Building Society/Credit Union/CMT	Branch address
<input type="text"/>	<input type="text"/>
Account name	
<input type="text"/>	
BSB number	Account number
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>

Section 4 – Proof of Identity (applicable to Individual Members only) See 'Completing Proof of Identity'

I/We have attached a certified copy of my driver's licence or passport

OR

I/We have attached certified copies of both:

- Birth/Citizenship Certificate or Centrelink Pension Card

AND

- Centrelink payment letter or Government or local council notice (less than 1 year old) with name and address

Note: You MUST complete this section as there may be a delay in processing your request without it.

Section 5 – Authorisation

Signature <input type="text"/>	Capacity <input type="text"/>	Date <input type="text"/> / <input type="text"/> / <input type="text"/>
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Signature <input type="text"/>	Capacity <input type="text"/>	Date <input type="text"/> / <input type="text"/> / <input type="text"/>
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Checklist

- Have you read the important information?
- Have you signed and dated the form?
- Have you attached the certified documentation including any linking documents if applicable?

Company Seal

If the above checklist items have not been ticked off there may be a delay in the processing of your withdrawal request.

IMPORTANT INFORMATION

Completing Proof of Identity

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

Acceptable documents include **EITHER** one of the following:

- current driver's licence issued under State or Territory law; or
- passport.

OR

one of the following documents

- birth certificate or birth extract; or
- citizenship certificate issued by the Commonwealth; or
- pension card issued by Centrelink that entitles the person to financial benefits.

AND

one of the following documents:

- letter from Centrelink regarding a Government assistance payment; or
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address (i.e. Tax Office Notice of Assessment, rates notice from local council).

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll, or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

Certification of Personal Documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original copy and make sure both the documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (e.g. Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as TRUE AND CORRECT copies:

Authorised Persons for Certification		
a Justice of the Peace	a notary public officer	a police officer
a judge of a court	a magistrate	a registrar or deputy registrar of a court
an Australian consular officer or an Australian diplomatic officer	a Chief Executive Officer of a Commonwealth Court	a person enrolled on the roll of a State or Territory Supreme Court or High Court of Australia, as a legal practitioner
a permanent employee of Australia Post with two or more years of continuous service	a finance company officer with two 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 two or more years of continuous service with one or more licensees