

Step 3 – Provide payment instructions (continued)

Option 3: Transfer my pension back to my super account

Note: Your current super investment options will apply (for other options please complete an Investment Switching Form)

Option 4: Early Release of your superannuation benefit on compassionate grounds

Contact the Australian Prudential Regulation Authority (APRA) on 1300 131 060. You must attach the original approval letter from APRA when returning this form. Any approved amount can be paid by cheque.

Option 5: Early Release of your superannuation benefit due to Financial Hardship

You will also need to complete and attach the form Early release of superannuation benefits - Financial Hardship. Any approved amount can be paid by cheque.

Option 6: Departing Australia Superannuation Payment (This option is not available to citizens of Australia and New Zealand or Australian permanent residents)

If you entered Australia on an eligible temporary resident visa and you have permanently left Australia, you may claim any super you have accumulated. Please download an application form from the ATO website (www.ato.gov.au). You can only complete and send this application after you leave Australia. Any approved amount can be paid by cheque.

Note: If your claim is more than \$5,000, your super fund will need confirmation of your immigration status. You must apply to the Department of Immigration and Citizenship (DIAC) to obtain this information.

Step 4 – Provide investment option details

Your withdrawal will normally be made in the same proportions as your selected investment options. However, you may select to have withdrawals made from a particular investment option until the holdings in that option are exhausted.

Please make my withdrawal in the same proportions as my account balance

Please make my withdrawal from the following options :-

	Percentage to be withdrawn			
Diversified (default)	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Shares Plus	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Defensive	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
International Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Green Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Property	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Diversified Bonds	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Indexed Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Total	1	0	0	

Step 5 – Complete preservation declaration

If over 55 and retiring permanently from the workforce.

- A portion of your benefit may be subject to preservation. If the preserved portion of your benefit is over \$200, legislation requires that this amount be retained in an approved roll-over fund until:

- You are at least 60 years of age and have ceased employment since attaining age 60;

OR

- You are between 55 and 60 years old, have ceased employment and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations to allow your benefit payment to be processed.

(select an option)

Yes, I am at least 55 years of age, have ceased employment and intend to permanently retire from the workforce when leaving this employer.

Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.



Step 6 – Confirm if splitting contributions

Should you wish to split your super contributions with your spouse for the current or previous financial years, you will also need to complete and return a contributions splitting application form. Note that contributions splits cannot be processed after your benefit payment has been made so it is important that any split request is lodged along with (or prior to) these payment instructions.

A copy of the contributions splitting application form, as well as a fact sheet providing additional information on contributions splitting, can be obtained by calling NGS Super Customer Service on 1300 133 177 or from the website www.ngssuper.com.au.

Tick here if you intend to lodge a split request either prior to or with this form.

Step 7 – Advise your Tax File Number on attached form (optional)

Should you choose not to provide your Tax File Number additional tax may be deducted, please refer to the TFN form for details.

Step 8 – Attach proof of identity

For identification purposes, you **MUST** attach a copy of either your Driver's Licence or Passport (or acceptable alternatives). See the "Completing proof of identity" section for details of certification and acceptable alternative documents.

I have attached a **certified** copy of the appropriate proof of identity

Failure to provide appropriate proof of identification may result in delays in the processing of your payment(s).

Step 9 – Sign the form

By signing this form I understand that:

- Information contained in this form will be relied upon and used by the Trustee to process my benefit payment. It may be disclosed to the Trustee's administrator, government agencies, my employer and other parties as required, including the trustee of any other fund I may transfer to. By signing this form I consent to the handling of my personal information in this manner. If I do not provide the information my payment request may not be processed.
- a withdrawal fee is applied each time a benefit is paid. This fee does not apply to retirement benefits paid in full as cash or transfers to the NGS Super account based pension.
- there may be a delay in payment if my details have changed.
- I can access my personal information by writing to the NGS Super Privacy Officer, Level 16, 99 Bathurst Street, Sydney, NSW 2000.

Signature

Date

X

□ □ / □ □ / □ □ □ □

Send your completed form together with your proof of identity to:

NGS Super

GPO Box 4303

Melbourne VIC 3001

Step 10 – Complete the following checklist

Have you attached the appropriate certified identification as outlined in the Completing proof of identity section?

If you reside overseas please ensure that you have attached the appropriate certified identification as outlined in the Completing proof of identity section.

Have you signed and dated the form?

Have you completed all sections relevant to the type of benefit payment you are requesting?



Change Personal Details

Step 1 – Complete your new details

Complete the boxes below to change your personal details (only input for changes otherwise leave blank)

Input new name

Input new Postal address

Suburb

State

Postcode

Step 2 – Attach documentation

Attach documentation that supports your change. For name changes this must be in the form of a certified copy of a marriage certificate or a certified copy of a deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office (see the **Completing proof of identity** section for details of how to certify documents).

For postal address changes a copy of a recent bill or mail item must be provided. Alternatively, you can call NGS Super Customer Service on 1300 133 177 to update your postal address.

Changes to your personal details will not occur unless you action your change in accordance with these instructions.

Step 3 – Sign the form

Sign the form to authorise your changes and confirm provision of supporting documentation.

I have attached a certified copy of my marriage certificate, deed poll or change of name certificate to support my name change.

I have attached a copy of a recent bill or mail item to support my postal address change.

Signature

Date



Completing proof of identity

Primary photographic identification

You will need to provide a certified copy of **one** of the following primary identification documents:

- Current Australian or foreign driver's licence (including the back of the driver's licence if your address has changed)
- Australian passport
- Current foreign passport¹, or similar document issued for the purpose of international travel¹
- Current card issued under a State or Territory for the purpose of proving a person's age
- Current national identity card issued by a foreign government for the purpose of identification¹

Identification documents must not be expired (excepting an Australian passport which may be expired within 2 years).

Alternative identification

If you are unable to provide any primary photographic identification, you will need to provide **two** identification documents, one from each of the following lists:

- Birth certificate or birth extract¹
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a Marriage Certificate, Decree Nisi or Deed Poll (in addition to the above identification).

If your legal name or date of birth does not match exactly to our records (excluding aforementioned name changes), please contact us for further instructions.

Signing on behalf of another person

If you are signing on behalf of the applicant you will need to provide the following:

- A **certified** copy of the Guardianship papers or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the applicant.

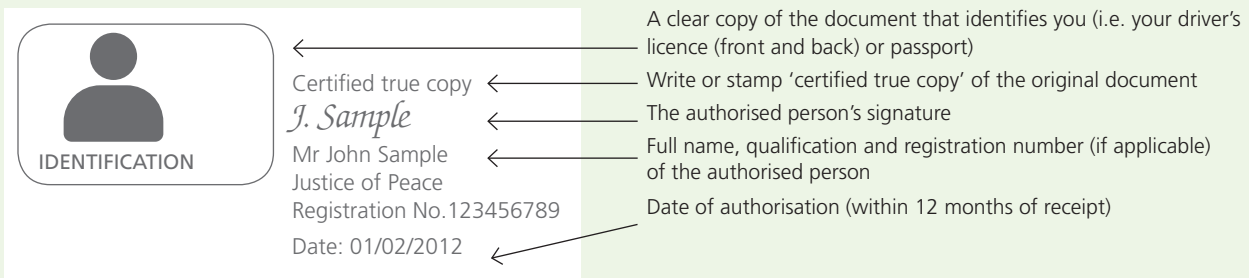
¹ Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- Written or stamped 'certified true copy'
- Signature and printed full name
- Qualification (such as Justice of the Peace, Australia Post employee, etc)
- Date (the date of certification must be within the 12 months prior to our receipt)



The diagram illustrates the components of a certified true copy. On the left, a rounded rectangle contains a silhouette of a person and the word "IDENTIFICATION". To its right, a list of text is shown with arrows pointing from each line to the corresponding part of the certified copy. The text includes: "Certified true copy", a signature "J. Sample", "Mr John Sample", "Justice of Peace", "Registration No. 123456789", and "Date: 01/02/2012". On the right side, a legend explains each component: "A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)", "Write or stamp 'certified true copy' of the original document", "The authorised person's signature", "Full name, qualification and registration number (if applicable) of the authorised person", and "Date of authorisation (within 12 months of receipt)".

Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

Important Note

The information in this document is a guide only and we may request additional documentation prior to any payment.



Completing proof of identity

Who can certify documents in Australia?

- **Australia Post permanent employee or agent** (who is currently employed with the post office & has at least two continuous years of service or is in charge of supplying postal services to the public)
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank officer, building society officer or credit union officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Court Officer**, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Justice of the Peace**
- **Legal practitioner on the roll of the Supreme Court of a State or Territory, or the High Court of Australia**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- **Medical practitioner, chiropractor, dentist, nurse, optometrist, physiotherapist, psychologist**
- **Member of Chartered Secretaries Australia**
- **Member of Engineers Australia** (other than at the grade of student)
- **Member of the Association of Taxation and Management Accountants**
- **Member of the Australasian Institute of Mining and Metallurgy**
- **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- **Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants**
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Officer with, or Authorised Representative of an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)
- **Officer with, or a credit representative of, a holder of an Australian credit licence** (who has had at least two years of continuous service with one or more licensees).
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority with two or more years of continuous service**
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Pharmacist**
- **Police Officer or Sheriff**
- **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Trade marks attorney or patent attorney**
- **Veterinary surgeon**

Who can certify documents outside of Australia

- **an authorised staff member of an Australian Embassy, High Commission or Consulate**
- **an authorised employee of the Australian Trade Commission** who is in a country or place outside Australia
- **an authorised employee of the Commonwealth of Australia** who is in a country or place outside Australia
- **a Member of the Australian Defence Force** who is an officer or a non-commissioned officer with 5 or more years of continuous service
- **a Notary Public from a country ranked 129 or below in the latest Transparency International Corruptions Perception Index:**
<http://www.transparency.org>



Tax File Number notification

In line with the Superannuation Industry (Supervision) Act 1993, the Trustee of NGS Super is authorised to ask for your tax file number. The Trustee will only use your tax file number for lawful purposes. These purposes may change in the future if there are changes to legislation.

The Trustee may pass your tax file number to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your tax file number:

- the Trustee will be able to accept all types of contributions made by or for you (some limits may apply)
- you can avoid paying tax at a higher rate than would otherwise apply on your contributions
- you can avoid paying tax at a higher rate than would otherwise apply on your super benefit, and
- it will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

Choosing not to provide your tax file number is not an offence. However, if you don't provide your tax file number now or in the future:

- the Trustee will only be able to accept contributions made for you by your employer. No other contributions, for example after-tax contributions, can be accepted
- you may pay more tax on contributions made for you by your employer. In some circumstances you may be able to claim back this additional tax, however time limits, fees and other rules may apply
- you may pay more tax on your super benefit than you would otherwise (although you can claim this back when you lodge your tax return).

If you wish to provide your TFN to the Trustee please complete this form and return it attached with your Payment Instructions.

Please note that your signature will serve as an acknowledgment that you understand the circumstances in which your TFN may be collected and used.

Given names

Surname

Date of birth

Member Number

(select an option)

My Tax File Number is - -

I do not wish to provide my Tax File Number to the Trustee

Signature

Date

