

# REQUEST FOR WITHDRAWAL

Please send your completed form to:

**NGS Super**  
**GPO Box 4303**  
**MELBOURNE VIC 3001**

## If you need help

If you're unsure of your decision, consider obtaining professional advice. We offer single-issue advice limited to your NGS Super account at no cost:

- over the phone through our Financial Advice Helpline or
- through our **Customer Relationship Managers**.

Further, we offer low-cost tailored advice through NGS Financial Planning. To make an appointment phone us on **1300 133 177** or complete the **Financial planning enquiry form** on our website at [ngssuper.com.au/advice](http://ngssuper.com.au/advice)

### Step 1. Complete your personal details

Please print in black or blue pen, in capital letters, one character per box.



NGS Member number

Title

Date of birth

Given names

Surname

Personal email

Residential address (must be advised)

Suburb

State

Postcode

Postal address (if different to above)

Suburb

State

Postcode

Daytime telephone

### Step 2. Complete preservation declaration

Please complete for cash payment.

You cannot make a cash withdrawal from an NGS Transition to retirement account until one of the following conditions have been met. Please complete one of the following declarations and ensure that your proof of identity (requested at Step 5) shows your date of birth

(Select one option only )

- I was born on or before 30 June 1964, have ceased employment and have permanently retired<sup>1</sup> from the workforce
- I am at least 60 years of age and have ceased a gainful employment<sup>2</sup> arrangement since attaining age 60, even if I am not permanently retired<sup>1</sup>
- I am at least 65 years of age.
- I do not meet any of the above conditions. I understand I can only make withdrawals from my unrestricted non-preserved component (if available).

<sup>1</sup> **Permanently retired** is defined as never being gainfully employed again for more than 10 hours per week.

<sup>2</sup> **Gainful employment** means being employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment.



### Step 3. Provide payment instructions (continued)

Fund address

Suburb

State

Postcode

Fund contact number

Fund ABN<sup>3</sup>

Unique Superannuation Identifier (USI)<sup>3</sup>

Membership or Policy number<sup>3</sup>

**If exempt from an ABN, tick the reason for exemption:**

Exempt Public Sector Super Scheme  Retirement Savings Account

<sup>3</sup>A rollover to another fund cannot occur without the ABN, USI/ESA and membership/policy number of the fund you are transferring to. If you are rolling over to an SMSF, you will also need to supply a copy of a bank statement of the Fund. If your rollover fund does not have an ABN, you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.

### Step 4. Provide investment option payment instructions

Complete for partial withdrawals only

Your withdrawal will normally be made in the same proportions as your selected investment options. However, you may elect to have withdrawals made from specific nominated options:

Make my withdrawal in the same proportions as my account balance

or

Make my withdrawal from the following options:

#### Payment amount

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

\$  ,    ,

#### Pre-mixed options

Diversified (MySuper) — *default investment option*

High Growth

Balanced

Defensive

Indexed Growth

#### Sector-specific options

Australian Shares

International Shares

Infrastructure

Property

Diversified Bonds

Cash & Term Deposits

#### TOTAL PAYMENT AMOUNT

## Step 5. Attach proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence (**front and back**) or passport (or acceptable alternatives). You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than two years' continuous service. For a full list of people who can certify documents and acceptable alternative documents, please visit [ngssuper.com.au/POI](http://ngssuper.com.au/POI). An example of how to certify documents is shown below.

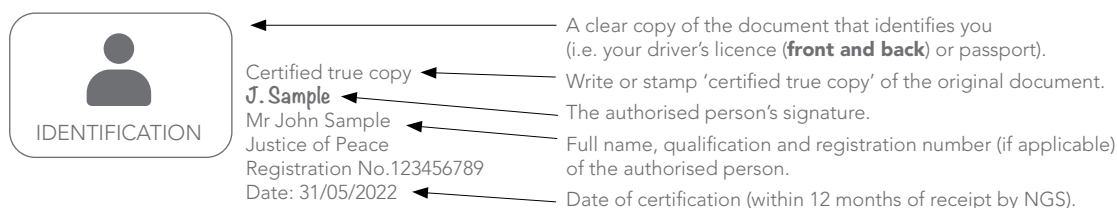
I have attached a certified copy of the appropriate proof of identity.

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

### 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 with more than 2 years' continuous service, etc.)
- date (the date of certification must be within the 12 months prior to our receipt).



The diagram shows a rounded rectangle representing a certified copy of a document. Inside the rectangle, there is a person icon and the word "IDENTIFICATION". To the right of the rectangle, there are five lines of text with arrows pointing to specific parts of the document:

- ← A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).
- ← Certified true copy
- ← **J. Sample** Write or stamp 'certified true copy' of the original document.
- ← Mr John Sample The authorised person's signature.
- ← Justice of Peace Full name, qualification and registration number (if applicable) of the authorised person.
- ← Registration No.123456789
- ← Date: 31/05/2022 Date of certification (within 12 months of receipt by NGS).

### 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.

## Step 6. Sign the form

By signing this form I acknowledge that:

- I have read and understood this form.
- The information contained in this form will be handled by NGS Super to process my withdrawal
- There may be a delay in payment if my details have changed
- Under Tax Office regulations, I must keep a copy of this form for 5 years from the date completed

I consent to my personal information being collected, disclosed and used as described in the [Privacy Collection Statement](#).

Signature

Date   /   /

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

**NGS Super**  
**GPO Box 4303**  
**MELBOURNE VIC 3001**

## Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to us.

Have you:

- Provided your member details in **Step 1**?
- Provided your payment instructions in **Step 3**?

If you are transferring to a Self Managed Super Fund (SMSF) in **Step 3 option 3**, have you provided:

- SMSF bank account statement?
- Electronic Service Address?
- Signed and dated the form at **Step 6**?

### Completing proof of identity

- Have you attached the correct identification as outlined in **Step 5**?
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
  - Written or stamped 'certified true copy'
  - Signature and printed name
  - Date — the date MUST be within twelve months of the date we receive your completed form
  - Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to [ngssuper.com.au/poi](https://ngssuper.com.au/poi) for more details on how to certify a document and a list of valid certifiers.

## Privacy Collection Statement

NGS Super Pty Limited ABN 46 003 491 487 of **Level 4, 14 Martin Place Sydney NSW 2000** collects personal information from you (or from third parties such as your employer or another super fund) to manage your NGS Super account, keep you informed, improve our products and services or take action on a matter you have contacted us about. If we don't have your personal information, we may not be able to perform these services. We may be authorised to collect your personal information by certain laws, including laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

We disclose personal information as required to manage the Fund, to service providers (including our administrator, our insurer and professional advisers), employers or parties required by law. Personal information may be accessed by service providers overseas, most likely by our administrator's processing centre in India. For any other offshore locations, details of how to access and change your personal information and the privacy complaints process, go to [ngssuper.com/pcs](https://ngssuper.com/pcs) and [ngssuper.com/privacy](https://ngssuper.com/privacy) or call us on **1300 133 177**.