







## Step 5. Complete preservation declaration

Please complete if you are selecting  
Option 1 (pay as cash) at Step 4.

A portion of your benefit may be subject to preservation. Please complete one of the following declarations and ensure that your proof of identity (requested at Step 6) shows your date of birth.

(Select an option )

- I was born on or before 30 June 1964, have ceased employment and have permanently retired<sup>2</sup> from the workforce
- I am at least 60 years of age and have ceased a gainful employment<sup>3</sup> arrangement since attaining age 60, even if I am not permanently retired<sup>2</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>2</sup> **Permanently retired** is defined as never being gainfully employed again for more than 10 hours per week.

<sup>3</sup> **Gainful employment** means being employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment.

## Step 6. 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. 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 arrows pointing to specific text elements, each with a corresponding description:

- Arrow 1 points to the top of the rectangle: A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).
- Arrow 2 points to the text "Certified true copy": Write or stamp 'certified true copy' of the original document.
- Arrow 3 points to the signature "J. Sample": The authorised person's signature.
- Arrow 4 points to the text "Mr John Sample Justice of Peace Registration No.123456789": Full name, qualification and registration number (if applicable) of the authorised person.
- Arrow 5 points to the text "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 7. Providing your tax file number

There may be tax implications if you have not yet provided, or choose not to provide, your tax file number (TFN). Whilst it is not compulsory to provide your TFN, not doing so could cost you in the following ways:

- you may have paid more tax than necessary on super contributions made for you by your employer (including SG, salary sacrifice and other contributions) in this financial year. This additional tax can be reversed if you provide your TFN to the fund before the end of the financial year, or your earlier payment from the fund. Although you may be able to claim back this additional tax if you later provide your TFN, time limits and other rules may apply, which may affect the size of any refund.
- you may pay additional tax on your super payout. However it might be possible to claim this back when lodging your tax return.
- you may miss out on any government Super Co-contributions for which you may be eligible; and
- you may have difficulty locating your super in the future, should you lose contact with your fund(s).

(Select an option )

- My tax file number is    -    -
- I do not wish to provide my tax file number to the Trustee

Signature

Date   /   /

## Step 8. Complete the checklist

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

- Provided your member details in **Step 1**?
- Attached supporting documentation for any change of name, date of birth or address detailed in **Step 3**?
- Provided complete payment instructions in **Step 4**?
- Signed and dated the form (**Step 9**)?
- If you are requesting payment via EFT, provided proof of your account details such as a statement that shows your BSB number, your bank account number and your account name **Step 4 Option 1**.

### Completing proof of identity

- Have you attached the correct identification as outlined in **Step 6**?

Select the identification you have provided:

- One primary identification document or
  - Two alternative identification documents (one from each of the lists specified)
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
  - Are your documents 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 with more than two years' continuous service, etc)

Please refer to the **Proof of identity** information sheet at [ngssuper.com.au/poi](http://ngssuper.com.au/poi) for more details on how to certify a document and a list of valid certifiers.

## 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
- there may be delay in payment if my details have recently changed
- I consent to my personal information being collected, disclosed and used as described in the **Privacy Collection Statement**.

Signature

Date   /   /

Please return your completed form together with your proof of identity to:

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

## 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](http://ngssuper.com/pcs) and [ngssuper.com/privacy](http://ngssuper.com/privacy) or call us on **1300 133 177**.