

Income account

REQUEST FOR WITHDRAWAL

Save time, apply online
 Requesting a withdrawal via the **Member Online** portal is quick and easy. Simply login via **ngssuper.com.au/MOL** and make your request.

If you need help

For assistance call us on **1300 133 177** or refer to our website **ngssuper.com.au**.

Please send your completed form to:

NGS Super
GPO Box 4303
MELBOURNE VIC 3001

Step 1. Complete your personal details *Please print in black or blue pen, in capital letters, one character per box.*

Title Mr <input type="radio"/> Mrs <input type="radio"/> Ms <input type="radio"/> Miss <input type="radio"/> Other <input type="checkbox"/>		Date of birth
Given names		
Surname		
Personal E-mail		
Residential address (must be provided)		
Suburb	State	Postcode
Postal address (if different to above)		
Suburb	State	Postcode
Daytime telephone	Mobile	
Membership number		

Step 2. Provide payment instructions

Please note, if your account balance reduces to \$2,000 or less, we may choose to pay out your account balance as a lump sum and close your account.

Please pay the commutation as follows:

Option 1: Pay as cash (select an option) tax may be payable on cash payments

Full withdrawal (if available under the rules of the Fund)

Please retain \$ in my NGS Income account and pay the remainder

A partial withdrawal of \$ gross

I wish to have my withdrawal paid by (select an option):

Cheque
or
 Electronic Funds Transfer (EFT)

Payments will be paid either by cheque (in the name of the account holder only) and sent to the address shown in Step 1, or by EFT to the account where your regular Income account payments are forwarded.

Continued over

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Step 3. Provide your investment options (choice product) for your payment instructions

This section to be completed by members requesting a partial withdrawal payment 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:

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

or

Please make my withdrawal from the following:

Pre-mixed options:

	Payment amount
Moderate Growth – <i>default</i>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Diversified	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
High Growth	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Balanced	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Defensive	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Socially Responsible Diversified	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Indexed Growth	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Retire Plus	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Shares Plus	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Sector-Specific options:

Australian Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
International Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Infrastructure	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Property	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Diversified Bonds	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Cash & Term Deposits	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
TOTAL PAYMENT AMOUNT	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Tailored option:

NGS Self-Managed Direct Investment Option (DIO)

If you wish to include in this withdrawal request some or all of your investment in the NGS Self-Managed DIO, you must first transfer these investments back into your NGS pre-mixed or sector-specific investments using your **Member Online** account at ngssuper.com.au/MOL. Transferring money from NGS Self-Managed DIO may take some time to complete. Refer to the **NGS Self-Managed Guide** for details available at ngssuper.com.au/PDS.



Step 4. Attach proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence 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/completing-proof-of-identity/. 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 two years' continuous service, etc)
- Date (the date of certification must be within the 12 months prior to our receipt)



← A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
← Certified true copy ← Write or stamp 'certified true copy' of the original document
← J. Sample ← The authorised person's signature
← Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person
← Justice of Peace ← Date of certification (within 12 months of receipt by NGS)
← Registration No.123456789
← Date: 01/07/2019

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 5. 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 *Income account* 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 five (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 2**?

If you are transferring to a Self Managed Super Fund in **Step 2 option 3**

- Ensured the fund address is up-to-date on the ATO's website at superfundlookup.gov.au?
- Attached a copy of the SMSF's bank account statement?
- Signed and dated the form in **Step 5**?

Completing Proof of Identity

- Have you attached the correct identification as outlined in **Step 4**?
- 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/completing-proof-of-identity/ for more details on how to certify a document and a list of valid certifiers.



PRIVACY COLLECTION STATEMENT

If you are a member of NGS Super, or you are applying for membership

We may collect your personal information from you or from third parties such as:

- your employer
- a previous super fund
- your financial adviser
- our related entities
- publicly available sources.

We may be required or authorised by law to collect your personal information. Relevant laws include the Australian Securities and Investments Commission Act 2001, Corporations Act 2001, Family Law Act 1975 and laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

If we are unable to collect all the personal information we have asked for, we may not be able to administer your NGS Super account or take action on a particular request you have made.

We will use your personal information to:

- manage your NGS Super account (NGS *Accumulation, Transition to Retirement or Income account*)
- give you information about your NGS Super account
- supply you with information about other products and services offered by us or our related companies
- include your relevant account data in statistics and market research.

We will disclose your personal information to various organisations (but only as required to manage your NGS Super account or the Fund generally), including:

- our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer)
- our insurer
- our professional advisers
- your employer
- other service providers that provide services or products relevant to your NGS Super account
- any relevant government authority that requires your personal information to be disclosed.

In managing your super your personal information may be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our [Privacy Policy](#) lists any other relevant offshore locations.

Our [Privacy Policy](#) sets out in more detail

- how we deal with your personal information
- how to access and seek correction of the information we hold about you
- how you may lodge a complaint if we breach an Australian Privacy Principle
- how we will handle any complaint.

You can view our [Privacy Policy](#) at ngssuper.com.au/privacy-policy or obtain a copy by contacting us on **1300 133 177**.

If you have any other queries in relation to privacy issues, or if you do not wish to receive marketing material, you may contact us on **1300 133 177**. You may also write to the NGS Super Privacy Officer at:

NGS Super
PO Box 21236
World Square NSW 2002

or online at ngssuper.com.au/contact-us.

If you are not a member of NGS Super, and you are not applying for membership

We will use your personal information only to enable us to take action on the particular matter you have contacted us about. In most instances we will not need to collect any further personal information from any other source. We will disclose your personal information only to those organisations mentioned above as are necessary to take action on the matter in question or for the management of the Fund generally.

Issued by NGS Super Pty Limited ABN 46 003 491 487 AFSL No 233154 the trustee of NGS Super ABN 73 549 180 515

**ngs
Super**



Incorporating **qjecs**super division

