Transition to retirement account

Request for withdrawal

If you need help

Getting advice on your NGS Super account is easy. Whether it's a simple check in to understand your options or comprehensive advice for you and your family, we have you covered. Contact us on **1300 133 177** to make an appointment or learn more at **ngssuper.com.au/advice-and-education/advice-services**.

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

Residential address **(must be advised)**

Suburb

State

Postcode

Postal address (if different to above)

Suburb

State

Postcode

Phone number –

Mobile –

Personal email

Step 2. Complete preservation declaration

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 am at least 60 years of age, have ceased employment and have permanently retired[1] from the workforce
- ◯ I am at least 60 years of age and have ceased a gainful employment[2] arrangement since attaining age 60, even if I am not permanently retired[1]
- ◯ 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).

[1] **Permanently retired** is defined as never being gainfully employed again for more than 10 hours per week.

[2] **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

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 one option √) - tax may be payable on cash payments. **See Step 2 for preservation declaration**.

- ◯ A partial withdrawal of **$** , , (before tax if applicable)
- ◯ Please retain **$** , , in my NGS Transition to retirement account and pay out the remainder
- ◯ Full withdrawal — close my account (if available under the rules of the Fund)

Payment can only be made from your unrestricted non-preserved component if you do not meet a condition of release as shown in Step 2.

Payments will be paid by EFT to the account where your regular NGS Transition to retirement account payments are deposited.

Option 2: Roll-back to an NGS Accumulation account

If you do not have an active NGS Accumulation account please apply online at **ngssuper.com.au/join** or complete and attach a Membership Application form available in the **NGS Accumulation Product Disclosure Statement** at **ngssuper.com.au/pds**

Please pay into my existing NGS Accumulation account number:

Please pay **(select one option √):**

- ◯ Total benefit — close my NGS Transition to retirement account
- ◯ Please retain **$** , , in my NGS Transition to retirement account and transfer the remainder
- ◯ Partial amount of **$** , ,

Note: Your current NGS Accumulation account investment options will apply. If you wish to select different investment options, you will need to request this through your **Member Online** account at **member.ngssuper.com.au/mol** or by completing an **Investment switching form**.

Option 3: Rollover to another fund (select one option √):

- ◯ Full rollover — close my account (if available under the rules of the Fund)
- ◯ Please retain **$** , , in my NGS Transition to retirement account and transfer the remainder
- ◯ A partial rollover of **$** , ,

Name of fund

◯ **This fund is a Self Managed Super Fund (SMSF)**

Note: All payments to an SMSF will be paid by EFT. Please ensure the SMSF bank details are up-to-date on the ATO's website **abr.gov.au**. Please provide a copy of the SMSF's bank account statement. Payments can only be processed if you have provided your SMSF's Electronic Service Address (ESA).

Name of financial institution

BSB

Account Number

Account name

Electronic Service Address (ESA)[3]

[3] 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.

Continued over

Step 3. Provide payment instructions (continued)

Fund address

Suburb

State

Postcode

Fund contact number

–

Fund ABN[3]

– – –

Unique Superannuation Identifier (USI)[3]

Membership or Policy number[3]

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

Exempt Public Sector Super Scheme ☐ Retirement Savings Account ☐

[3] 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**. 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 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).

A clear copy of the document that identi es 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
Justice of Peace — Full name, qualification and registration number (if applicable) of the authorised person.

Registration No.123456789
Date: 31/12/2023 — 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 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 5 years from the date completed.

I consent to my personal information being collected, disclosed and used by NGS Super as described in the **Privacy Collection Statement**.

Signature ✗ Date / /

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

NGS Super
GPO Box 4721
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** 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 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. For offshore locations, details of how to access and change your personal information and the privacy complaints process, go to **ngssuper.com.au/pcs** and **ngssuper.com.au/privacy** or call us on **1300 133 177**.