

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.**

Full withdrawal - close my account (if available under the rules of the Fund)

Please retain \$ in my *NGS Transition to Retirement account* and pay out the remainder

A partial withdrawal of \$ gross (before tax, where applicable)

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.

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

Cheque

or

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 *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 **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 ngssuper.com.au/MOL or by completing an **Investment switching form**.

Option 3: Rollover to another fund (select an 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 a SMSF will be paid by EFT. Please ensure the SMSF address is up-to-date on the ATO's website superfundlookup.gov.au and please provide a copy of the SMSF's bank account statement.

Name of financial institution

BSB

Account number

Account name

Continued over

Step 3. Provide payment instructions (continued)

Fund address

Suburb

State

Postcode

Fund contact number

Fund ABN³

Unique Superannuation Identifier (USI)³

Membership or policy number³

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

Exempt Public Sector Super Scheme Retirement Savings Account

³A rollover to another fund cannot occur without the ABN, USI and membership/policy number of the fund you are transferring to. 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:

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

or

Please make my withdrawal from the following options:

Pre-mixed options:

Diversified (MySuper) - default investment option

\$

High Growth

\$

Balanced

\$

Defensive

\$

Socially Responsible Diversified

\$

Indexed Growth

\$

Shares Plus

\$

Sector-specific options:

Australian Shares

\$

International Shares

\$

Infrastructure

\$

Property

\$

Diversified Bonds

\$

Cash & Term Deposits

\$

TOTAL PAYMENT AMOUNT

\$

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 5. Attach proof of identity

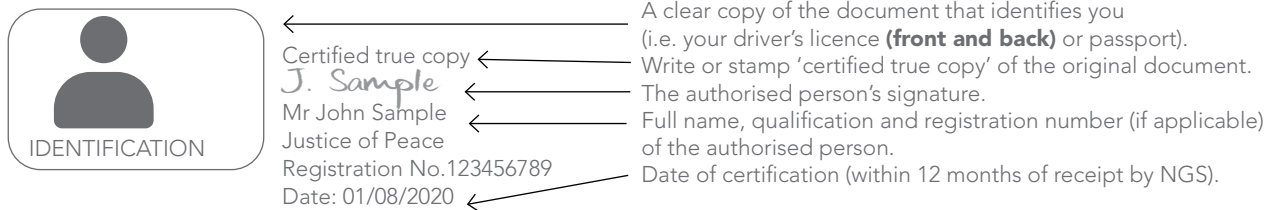
For identification purposes, you **MUST** attach a certified copy of either your driver's licence (**front and back**) or passport (or acceptable alternatives). You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than 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. Failure to provide appropriate proof of identification may result in delays in the processing of your payment(s).

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

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)



The diagram shows a rounded rectangle labeled 'IDENTIFICATION' containing a silhouette of a person. To the right of the rectangle, several lines of text are listed, with arrows pointing from each line to a corresponding field in the 'IDENTIFICATION' box:

- ← 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
- ← Registration No. 123456789
- ← Date: 01/08/2020 ← 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 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 3**?
If you are transferring to a Self Managed Super Fund (SMSF) in **Step 3 option 3**
 - Ensured the fund address is up-to-date on the ATO's website at superfundlookup.gov.au
 - Attach a copy of the SMSF's bank account statement
- 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 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.au/pcs and ngssuper.com.au/privacy or call us on **1300 133 177**.