

Step 2. Provide payment instructions (continued)

Option 2: Roll-back to NGS Super Accumulation account

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

Please pay into my existing NGS Accumulation account number

Please pay:

Total benefit

or

Partial amount of \$

Option 3: Rollover to another fund (select an option)

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

or

A partial withdrawal of \$

Name of fund

This fund is a Self Managed Super Fund

Note: All payments to a Self Managed Super Fund will be paid by EFT. Please ensure the fund address is up-to-date on the ATO's website www.superfundlookup.gov.au and please provide a copy of the SMSF's bank account statement.

Name of Financial Institution

BSB

Account Number

Account name

Fund address

Suburb

State

Postcode

Fund contact number

 -

Fund ABN¹

 - - -

Unique Superannuation Identifier (USI)¹

 - - -

Membership or Policy number¹

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

Exempt Public Sector Super Scheme Retirement Savings Account

¹ A transfer to another fund cannot occur without the ABN, USI and member/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 3. Provide investment choice 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

Please make my withdrawal from the following options:

Pre-mixed options:

Defensive

Payment amount
\$,

Balanced

\$,

Socially Responsible Diversified

\$,

Moderate Growth – *default investment option*

\$,

Diversified

\$,

Indexed Growth

\$,

High Growth

\$,

Shares Plus

\$,

Retire Plus

\$,

Sector-Specific options:

Cash & Term Deposits

\$,

Diversified Bonds

\$,

Property

\$,

Australian Shares

\$,

International Shares

\$,

TOTAL PAYMENT AMOUNT

\$,

Tailored option:

NGS Self-Managed

If you wish to include in this withdrawal request some or all of your investment in the NGS Self-Managed option, 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/login. Transferring money from NGS Self-Managed 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' service. For a full list of people who can certify documents and acceptable alternative documents, please visit www.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, 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: 01/02/2017

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 understand that:

- I have read and understood this form
- the information contained in this form will be handled by the Fund 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 the Fund.

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**

- Ensure the fund address is up-to-date on the ATO's website at www.superfundlookup.gov.au
- Attach a copy of the SMSF's bank account statement
- Signed and dated the form **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 www.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 (*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

www.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 PO Box 21236 World Square NSW 2002 or online at **www.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.