

Benefit payment request (Pension)

Return this completed form to:

legalsuper
 Locked Bag 5081
 Parramatta NSW 2124
 Phone: 1800 060 312

Please use **BLOCK letters and black ink** when completing this form. Read all the information on the back of this form to help you complete your benefit payment request correctly. This request will be invalid if unsigned or undated and will be returned to you for completion. Attach any associated documentation before returning it to legalsuper.

1. Personal details

Membership number

Date of birth (dd/mm/yyyy)

Mr Mrs Ms Miss Dr Justice

Surname

Given names

Street/Unit No.

Street name

Suburb/Town/City

State Postcode

Occupation

Telephone (daytime contact)

Email

Trading name of last employer to contribute to **legalsuper** on your behalf

Is this your current employer?
 Yes No

Date left employment (if applicable) (dd/mm/yyyy)

2. Tax file number (TFN) details

Under the *Superannuation Industry (Supervision) Act 1993*, legalsuper is authorised to collect, use and disclose your TFN. legalsuper may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request legalsuper, in writing, not to disclose your TFN to any other superannuation provider. Declining to quote your TFN to legalsuper is not an offence. However, giving your TFN to legalsuper will have the following advantages:

- legalsuper will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits; and

- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

I agree to provide my tax file number:
 Yes, my TFN is
 No Already provided

3. Payment Amount

Indicate either:
 Full benefit OR partial benefit \$

All lump sum cash payments are made by electronic fund transfer to the same bank account where your regular pension payments are credited.

4. Rollover fund details

I want to roll over:
 A. my total benefit B. my preserved portion only

Partial payments must be paid in proportion to your legalsuper account's taxable and tax-free components.

Name of rollover fund

Member policy/Plan number (if known)

Rollover fund ABN (required if rollover is to a superannuation fund)

Fund USI or SPIN Number (please obtain this number from the rollover fund)

Electronic service address
(applicable to Self Managed Super Funds)

To transfer your balance to a Self Managed Super Fund (SMSF), please complete the following SMSF bank details:

SMSF account name

SMSF BSB number

SMSF account number

Note:
 Please provide a copy of your SMSF bank statement* or your SMSF welcome letter from your bank* so we can verify that the above details you have provided are correct.
 *These documents must not be more than 12 months old.

B. Payments other than cash withdrawals or rollovers to SMSFs

For benefit payments other than cash withdrawals or rollovers to your SMSF, you will need to submit acceptable proof of identity with your application form. legalsuper requires that you obtain certified copies of your original documents.

Completing proof of identity requirements

You will need to provide certified documentation with this request to prove you are the person to whom the entitlements claimed belong. legalsuper will accept:

ONE OF THE FOLLOWING DOCUMENTS ONLY:

- a. driver's licence issued under State or Territory law; or
- b. passport.

OR

ONE OF EACH OF THE FOLLOWING:

- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address;
- a bank statement or utility notice with your current mailing address.

A *certified copy* means a document that has been certified as a true copy of an original document by one of the following persons:

- a person who is enrolled on the roll of Supreme Court of a State or Territory, or the High Court of Australia, a legal practitioner (however described);
- a judge of a court;
- a magistrate;
- a chief executive officer of a Commonwealth court;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a notary public (for the purposes of the *Statutory Declarations Regulations 2018*);
- a police officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in a office supplying postal services to the public;
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*);
- an officer with 5 or more continuous years of service with one or more financial institutions (for the purposes of the *Statutory Declarations Regulations 2018*); or
- a member of the Institute of Chartered Accountants in Australia and New Zealand, CPA Australia, the Association of Taxation and Management Accountants or the Institute of Public Accountants.

The certification should be dated and include the full name (both in print and signature), telephone number and type of authority (from above list) of the person certifying.

The document bearing the original certifying signature must be received by legalsuper, either by email or post.

Although they may be qualifying members of the legal profession, members (as well as their family members) cannot certify their own documents.

9. Declaration

- I acknowledge that if I am invested in the Direct Investment option (DIO) that my DIO funds must be transferred out of the DIO prior to processing my benefit payment request.
 - I have read and understood the Section headed 'Tax file number (TFN) details' and by signing below, I am authorising the Trustee to pay my benefit as indicated.
 - I understand that if I choose not to quote my TFN, the Trustee is required to deduct tax at the top marginal rate plus Medicare levy.
 - Where the full balance of my account is to be paid from legalsuper, I hereby release the Trustee from any further liability to me or my executors, administrators or dependants in respect to my participation in legalsuper, and request and authorise the termination of my membership in the Fund.
 - I declare that the information supplied by me is correct.
 - I have attached original certified documents, and they have not been self-certified (**Refer to 'Completing proof of identity requirements'**); or have consented to electronic verification of my identity.
 - I approve the deduction of any applicable fees from my benefits on exit, subject to legislative restrictions (exit fees are excluded).
 - I acknowledge that:
 - If I am transferring to a legalsuper accumulation account my transferred balance will be invested within the same investment option(s) in which my pension account is currently invested. No buy-sell spread will apply to my transferred balance as investment options will not change at this time.
 - After the transfer, I can change the investment option(s) of the transferred amount via MemberAccess. A buy-sell spread will apply for that change.
- Please refer to 'Your investment options if you need to transfer all or any of your pension balance as it exceeds the Transfer Balance Cap' in the *Pension Product Disclosure Statement* for further information.

Member's signature

Date (dd/mm/yyyy)

If applicable, you must submit the certified proof of identity document(s) with this form. Forms without proof of identity cannot be processed.

Please send the original of this form to:

legalsuper
Locked Bag 5081
Parramatta NSW 2124