

Flexi Pension withdrawal form



⚠ AVOID PROCESSING DELAYS
We make important changes to our forms at times. Check you're using the latest version by comparing the issue date at the bottom of this page with the version at unisuper.com.au/forms.

📄 SAVE TIME, GO ONLINE!
To make a one-off withdrawal from your pension, log in to your account at unisuper.com.au.

📄 WHEN WILL MY FORM BE PROCESSED?
If you've provided a correctly completed form (and any certified ID or other paperwork, if required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3 – 5 business days for your form to arrive. We'll contact you if we have any questions about your request.

Use this form to make a withdrawal from your Flexi Pension account.

Flexi Pension accounts require a minimum balance of \$10,000 to remain open.

If your request to withdraw funds from your Flexi Pension will take the balance of your account below \$10,000, we'll pay the entire balance of your account to your nominated bank account.

Understanding the risks

You should understand the risks and other implications of selecting and switching your investment options. Please read the latest *How we invest your money* booklet before completing this form. We recommend that you consult a qualified financial adviser before making any investment decisions.

Privacy information

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

For more information on how we collect and manage your information refer to the *Privacy statement* at the end of this form.

SECTION 1 — Member details

✦ Please use **BLACK** or **BLUE BALL POINT PEN** and print in **CAPITAL LETTERS**. Cross where required **X**
All fields in Section 1 are mandatory. Please ensure you complete all fields.

UniSuper Flexi Pension number

If you are unsure of your Flexi Pension number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

If you've changed your personal details (i.e. residential address and email address) since you last contacted us, please update your details by:

- ✦ logging in to your account at unisuper.com.au.
- ✦ completing a *Change of details form-pension members* (available from unisuper.com.au) or
- ✦ give us a call on **1800 331 685**.


What phone number do you want us to call you on if there is a question we need to ask you regarding this form?

Contact number (during business hours)

form continues ➤



SECTION 5 — Member declaration and signature

 Please read this declaration before you sign and date your form.

I declare:

- the information provided on this form is true and correct
- I request and consent to the withdrawal of my benefit as indicated on this form and authorise UniSuper to give effect to the withdrawal
- I understand that:
 - government rules require me to take my pro-rata minimum pension payments for the financial year before I can make a lump sum withdrawal in some circumstances
 - if I am under age 60, tax may be deducted from my withdrawal
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy.
- I acknowledge that if, after my withdrawal, there is less than \$10,000 in my account, UniSuper will pay the remaining balance to my nominated bank account.

Signature

Date (DDMMYYYY)



RETURN YOUR COMPLETED AND SIGNED FORM:

Email: pensionsmailbox@unisuper.com.au

Post: UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000



NEED HELP?

For more information:

- email pensionsmailbox@unisuper.com.au, or
- call **1800 331 685**.

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at [unisuper.com.au](https://www.unisuper.com.au) or by calling us on **1800 331 685**.