

# Flexi Pension withdrawal form



## Save time, go online!

To make a one-off withdrawal from your pension, log in to your account at [unisuper.com.au](https://unisuper.com.au).

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funds from your Flexi Pension will take the balance of your account below \$10,000, your entire balance will be withdrawn and your account will close.

## 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 if you send it by post. We'll contact you if we have any questions about your request.

## PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at [unisuper.com.au/privacy](https://unisuper.com.au/privacy). If you have any privacy related questions, please call **1800 331 685**.

## SECTION 1 MEMBER DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required.  
All fields in Section 1 are mandatory.

UniSuper pension number

If you are unsure of your 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 (DD/MM/YYYY)

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](https://unisuper.com.au).
- completing a *Change of details form-pension members* (available from [unisuper.com.au](https://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?

Daytime contact number



## SECTION 2 TRANSITION TO RETIREMENT

Have you taken your Flexi Pension under transition to retirement rules?

- No. Go to SECTION 3.
- Yes. Select the option that best describes your current circumstances.
- I'm still employed but wish to withdraw my unrestricted non-preserved benefits.\*
- I've reached preservation age, have permanently retired from the workforce and never intend to become gainfully employed again on a full or part-time basis. I understand that UniSuper is unable to release my super if my circumstances don't meet this definition, and that they may need to verify my retirement with my most recent employer. I give my express consent for UniSuper to contact my most recent employer if required.
- I'm aged between 60 and 65 and an arrangement under which I was gainfully employed has ceased on or after reaching age 60.\*\*
- I'm age 65 or over.

\* If you've started working again after time out of the workforce, the super you've accrued since starting work again is 'preserved' and you can't withdraw it until you meet another condition of release.

\*\*If you've returned to gainful employment since the termination of an earlier employment arrangement, the benefit that has accrued since you recommenced employment is preserved and may not be withdrawn until you meet another condition of release.

## SECTION 3 WITHDRAWAL AMOUNT

➤ The withdrawal amount will be paid to the same nominated financial institution account as your regular pension payments are made.

What amount would you like to withdraw? (minimum \$2,000)

\$

This amount needs to be gross (before tax is deducted). Amounts requested below the minimum will be processed as \$2,000.

## SECTION 4 WITHDRAWAL DRAWDOWN METHOD

If you want to choose which investment options your withdrawal is made from, select one of the following methods:

- Pro-rata** - Withdrawal comes from the investment options in proportion to the balance in each investment option at the time of withdrawal.
- Your choice** - Withdrawal comes from the investment options in an order nominated by you. (Please complete the section below.)

If you don't decide, then the withdrawal will be processed in the same way as your pension payments.

### Your choice

Select the order of investment options you want your withdrawal paid from.

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Cash                      | <input type="checkbox"/> Sustainable Balanced    | <input type="checkbox"/> Australian Shares                  |
| <input type="checkbox"/> Australian Bond           | <input type="checkbox"/> Growth                  | <input type="checkbox"/> International Shares               |
| <input type="checkbox"/> Conservative              | <input type="checkbox"/> High Growth             | <input type="checkbox"/> Global Environmental Opportunities |
| <input type="checkbox"/> Conservative Balanced     | <input type="checkbox"/> Sustainable High Growth | <input type="checkbox"/> Australian Equity Income           |
| <input type="checkbox"/> Diversified Credit Income | <input type="checkbox"/> Listed Property         | <input type="checkbox"/> Global Companies in Asia           |
| <input type="checkbox"/> Balanced                  |  |   |

Once your selections have been exhausted or if your account is invested in more than one option and you don't choose how your lump sum withdrawal is paid, your withdrawal will be deducted from your investment options in the default drawdown order set out in the *Flexi Pension PDS*.

**SECTION 6****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

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>DD</i>	<i>MM</i>	<i>YYYY</i>

**Returning your form**

Email: [pensionsmailbox@unisuper.com.au](mailto:pensionsmailbox@unisuper.com.au)  
Post: UniSuper  
Level 1, 385 Bourke Street  
Melbourne Vic 3000

**Need help?**

- Email [pensionsmailbox@unisuper.com.au](mailto:pensionsmailbox@unisuper.com.au)
- Call **1800 331 685**.