

Flexi Pension withdrawal form



Save time, go online!

The quickest way to withdraw from your Flexi Pension is through your online account. Log in 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 if you send it by post. 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funds from your Flexi Pension will take the balance of your account below \$10,000, your entire balance will be withdrawn and your account will close.

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.

Account number

If you're unsure of your account 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.
- completing a *Change of details form-pension members* (available from unisuper.com.au) or
- calling us 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 aged 65 or over

I'm aged between 60 to 64 and have ceased an arrangement of employment on or after reaching age 60.
The relevant employer was

and I stopped working there on ^{^#}
DD MM YYYY

I've reached preservation age, have ceased gainful employment and never again intend to become gainfully employed for 10 or more hours per week. The relevant employer was

and I stopped working there on ^{^#}
DD MM YYYY

I'm still employed but want to withdraw my unrestricted non-preserved benefits.

[^] Please note that any benefits subsequently accumulated and any investment earnings subsequently accrued will be preserved and may not be withdrawn until you meet another condition of release.

[#] Please note that UniSuper is unable to release your super prior to termination of employment and receipt of your last contribution from the relevant employer. UniSuper may need to verify your cessation of employment with the relevant employer. By selecting this option, you give consent for UniSuper to contact the relevant employer. UniSuper may also ask you to contact your employer and provide us with additional information on their behalf.

SECTION 3 WITHDRAWAL AMOUNT

▶ The withdrawal amount will be paid to the same nominated financial institution account as your regular income 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:

Default - Withdrawal is drawn from your investment options in the default order. (Set out in the *Flexi Pension PDS*).

Pro-rata - Withdrawal comes from your investment options in proportion to the balance in each investment option at the time of withdrawal.

Your choice - Withdrawal comes from your investment options in the 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 income payments.

Your choice

If you've chosen Your choice, select the order of investment options you want your withdrawal paid from. We can only accept number order, for example, 1, 2, 3, etc.

- | | | |
|--|--|---|
| <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 Dividend Income |
| <input type="checkbox"/> Australian Income | <input type="checkbox"/> Listed Property | <input type="checkbox"/> Global Companies in Asia |
| <input type="checkbox"/> Balanced | | |

Once your selections have been exhausted, your withdrawal will be deducted from your investment options in the default drawdown order set out in the *Flexi Pension PDS*.

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 (or an accumulation account for TTR Flexi Pension).
- If applying to withdraw my benefit after retirement, I understand UniSuper may need to verify my retirement with the relevant employer, and will be unable to release my super if I'm found to be still employed.

Signature

Date

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

Return your form to:

Email: pensionsmailbox@unisuper.com.au

Mail: UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000

PRIVACY INFORMATION

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

Need help?

- Email pensionsmailbox@unisuper.com.au
- Call **1800 331 685**.