

Compassionate grounds application form



Before using this form

Before you complete this form, the Australian Taxation Office (ATO) must have already approved your application to release super on compassionate grounds.

If you haven't submitted your application, you can apply with the ATO through your myGov account at www.my.gov.au or by calling them on 13 10 20.

AM I ELIGIBLE TO APPLY?

The ATO will assess your eligibility for release on compassionate grounds when you apply. To see the eligibility criteria, read the 'Accessing your super' section of our website at unisuper.com.au/access-super.

Please note, you can only apply for a payment on compassionate grounds if you're a citizen or permanent resident of Australia or New Zealand. If you're in Australia on a temporary resident visa and you're trying to access your super, call us on **1800 331 685** for more information.

YOUR CHECKLIST

- Apply through the ATO:** You need to apply and be approved by the ATO before completing this form—log in to your myGov account to apply online, or contact the ATO.
- Complete and return this form to us:** Once the ATO confirms and approves your claim, complete this form and return it via our *Upload a document* tool or post it to us.
- Verify your ID:** We're required by law to verify your identity. You can either verify your ID through your online account, provide your identification details in SECTION 3, or include a certified copy of your ID with your posted form (read the attached *Your guide to proof of identity* fact sheet for more information).

If you've provided a correctly completed form (and any certified ID or other paperwork, if required), we'll process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 5 business days for your form to arrive if sent via post. We'll contact you if we have any queries in relation to your request.

SECTION 1 MEMBER DETAILS

- ▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required. All fields in SECTION 1 are mandatory. Please ensure you complete all fields.

UniSuper member number

If you're unsure of your member 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 the *Change of details form—super members* (available from unisuper.com.au), or
- calling us on **1800 331 685**.

Daytime contact number



SECTION 2 TAX FILE NUMBER

➤ You don't have to provide your tax file number (TFN). However, if you don't provide it, you may pay more tax than you need to on your withdrawal.

I've already provided my TFN to UniSuper.

Provide my TFN:

I don't want to provide my TFN.

Read the important information about providing your TFN at unisuper.com.au/tfn. You can also request a copy of that information, free of charge, by calling **1800 331 685**.

SECTION 3 PROOF OF IDENTITY

Please choose **ONE** of the following options.

I will provide certified proof of identity (POI) documents via post. For a list of POI documents and certification guidelines, refer to the *Your guide to proof of identity* fact sheet at the back of this form.

I will verify my identity online before returning my form.

I will provide my identification details below for UniSuper to complete electronic verification on my behalf.

Please complete **ANY TWO** of the DRIVER'S LICENCE, MEDICARE or AUSTRALIAN PASSPORT options if you checked the third box above.

OPTION 1 - DRIVER'S LICENCE

Full name **exactly** as appears on my driver's licence

Licence number

Driver's licence card number

State of issue

OPTION 2 - MEDICARE

Full name **exactly** as it appears on my Medicare card

My Medicare number is

Card expiry date (MM/YYYY)

My reference number on this card is

Select your Medicare card colour

Green Blue Yellow

OPTION 3 - AUSTRALIAN PASSPORT

Full name **exactly** as appears on my passport

My **Australian** passport number is

SECTION 4 WHAT AMOUNT DO YOU WANT TO WITHDRAW?

➤ You can apply to withdraw up to the amount approved by the ATO—you need to have applied and been accepted by the ATO before you can complete this section.

\$ (Net of tax)

Note: If the amount you've nominated exceeds your account balance, we'll withdraw your entire balance and your account may close. If your account closes, or you have an insufficient balance to cover your insurance premiums, your insurance may cease. For more information, read the *Insurance in your super* booklet, available at unisuper.com.au/factsheets.

SECTION 5**FINANCIAL INSTITUTION DETAILS - FOR ELECTRONIC FUNDS TRANSFER (EFT) PAYMENT**

► Provide your financial institution account details to which the benefit payment will be paid.

Financial institution name

Name in which account is held

(Payments can only be made if the nominated financial institution account is in your name or a joint account in your name and can't be made to a third party.)

BSB number (must have six digits)

Account number

Please ensure you've entered your financial institution account details correctly. UniSuper's responsibility is discharged once payment is made to this account.

SECTION 6**MEMBER DECLARATION AND SIGNATURE**

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

- I declare that the information I have provided on this form is true and correct.
- I understand that if I am a Defined Benefit Division member with an accumulation component, UniSuper will first withdraw the requested funds from the accumulation component of my account. If the amount I've nominated exceeds the amount of my accumulation component, the balance will then be drawn from the defined benefit component of my account and a reduction factor will be applied to my defined benefit component.
- I understand that if the amount I've nominated exceeds my account balance, UniSuper will withdraw my entire balance and my account may close. If my account closes, or I have an insufficient balance to cover my insurance premiums, my insurance may cease.
- I understand that if I don't provide my TFN I may be liable to pay additional tax on my benefit payment.
- I understand that if paper copies of my certified documents are incorrectly certified, UniSuper will use the information on the documents to verify my identity electronically.
- I authorise payment to be made as indicated in SECTION 5.
- I consent to my personal information being used in line with UniSuper's Privacy Policy.
- I understand my details will be subject to an information match request and that the result will be provided through an external third party system.
- I understand if I intend to claim a tax deduction for some or all of my personal contributions, I must lodge a notice of intent to claim a tax deduction with UniSuper before making a withdrawal.
- I understand that the withdrawal will be processed proportionally from my selected investment options.

Signature

Date

DD MM YYYY

Returning your form

Electronically: use the [Upload a document tool at unisuper.com.au/contact-us](#).

Via post: mail to UniSuper Level 1, 385 Bourke Street, Melbourne Vic 3000.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your 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](#). If you have any privacy related questions, please call **1800 331 685**.

Need help?

Call **1800 331 685** or visit [unisuper.com.au/contact-us](#) for more options including chat.

Your guide to proof of identity

We prioritise the security of your super savings. To make withdrawals or other important changes to your account, you'll need to prove your identity. This fact sheet explains how to submit your ID documents, what documents we can accept, and how to properly certify copies.

Verifying your identity online

The quickest way to prove your identity is through your online account by logging into unisuper.com.au/memberonline. It should only take a few minutes, and you'll get instant confirmation of your ID check.

To verify your identity through your online account, you must currently reside in Australia and provide one or more of the following valid Australian documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card.

Please make sure that you've checked your personal details are up to date with relevant government agencies before you begin the process of verifying your identity online. We use government and public databases to securely verify your identity.

If you cannot confirm your identity via your online account, or if the documents you wish to verify aren't listed above, there are alternative methods to submit your proof of identity documents.

Other ways to verify your identity

You can verify your identity by providing us with certified copies of your ID documents. Before doing so, please ensure you've read this fact sheet to understand which documents are acceptable and how to certify them correctly. You'll also find instructions on how to submit your documents to UniSuper toward the end of this fact sheet.

CIRCUMSTANCES WHERE WE CAN VERIFY YOUR IDENTITY

On some forms, you have the option to include your identity details and give us permission to check them electronically, so you don't need to send certified copies of your ID documents.

In some cases, if the ID documents you send with a form aren't properly certified or are difficult to read, we may try to verify them electronically. Generally, if you've signed the form declaration, you've consented to this process. We'll use the documents you provided to verify your identity. If we're unable to confirm your identity, we will let you know.

ID documents we can accept

Generally, we'll accept either one document from List A or two documents from List B.

LIST A

A certified copy of your current:

- Australian driver's licence or permit
- Passport (expired Australian passports are acceptable if they expired within the last two years)
- Indigenous community card with your photograph issued by the Australian government or a local Indigenous community organisation
- A photo identification card issued by the Commonwealth, states or territories of Australia in your name.

LIST B**A certified copy of your:**

- Birth certificate or birth extract.
- Australian citizenship certificate.
- Concession card issued by Centrelink that entitles you to financial benefits, Australian Health Care card, or Department of Veterans' Affairs card, etc.

And:

- Letter from Centrelink regarding a Government assistance payment.
- Notice from the Australian Taxation Office (less than 12 months old) that contains your name and residential address e.g. Notice of Assessment.
- Rates notice from local council (less than 12 months old) that contains your name and residential address.
- Electricity, gas or water bill dated within the past three months that contains your name and residential address.

LINKING DOCUMENTS

For certain requests (such as updating your name or signing on a member's behalf), you must provide a certified linking document in addition to the standard ID documents. These documents demonstrate the connection between you and the change being made or the member. The documents may be issued by an official Australian or foreign entity. The requirement for linking documents varies based on the request, for example:

ACTION	SUITABLE LINKING DOCUMENT
Change of name (document must show history of name change)	<ul style="list-style-type: none"> • Marriage certificate • Divorce certificate • Change of name certificate • Registered relationship certificate • Birth certificate that shows history of name change • Deed Poll
Updating date of birth	<ul style="list-style-type: none"> • Birth certificate
Signing on behalf of another member	<ul style="list-style-type: none"> • Power of Attorney • Guardianship papers

Your linking document can be provided by/from another country. However, any foreign-issued documents not in English must first be translated into English.

Please note: The details of authority (e.g. Power of Attorney documentation) will need to be attached and noted on the member's account before any interaction proceeds. Once we have a valid authority in place, you'll still need to ensure you provide your certified Proof of Identity documents in order to provide us with any instructions in relation to the member's account.

Certifying your ID documents

Take your original document(s) along with a clear photocopy of both sides to an authorised person. We provide a list of who's authorised to certify IDs later in this fact sheet.

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
 - signature
 - printed name
 - qualification (e.g. Magistrate), and
 - date.

IMPORTANT THINGS TO REMEMBER

When having your ID documents certified, please ensure the following:

- All pages must be certified.
- The copy of the document must be certified directly, not attached on a separate page.
- Documents not written in English must be accompanied by an English translation prepared by an accredited translator. Both the original document and the translation need to be certified.
- Documents need to be certified within the last 12 months to be accepted.
- The documents being certified are acceptable and considered valid, as outlined in the sections above.

WHO CAN CERTIFY

Some of the people authorised to certify identity documents include:

1. A person currently licensed or registered under a state or territory law to practise in one of the following occupations:
 - Architect
 - Occupational therapist
 - Chiropractor
 - Optometrist
 - Dentist
 - Patent or trade marks attorney
 - Financial adviser or financial planner
 - Pharmacist
 - Legal practitioner
 - Physiotherapist
 - Medical practitioner
 - Psychologist
 - Midwife
 - Veterinary surgeon.
 - Nurse
2. Or, individuals from the following list:
 - A teacher employed on a permanent full-time or part-time basis at a school or tertiary education institution
 - An agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service at, an office supplying postal services to the public
 - An officer of a bank, building society, credit union or finance company with two or more years of continuous service

- A clerk, master, registrar or deputy registrar of a court
- A Judge or Magistrate
- A Justice of the Peace
- An accountant who is:
 - A Fellow of the National Tax Accountants' Association, or
 - A member of any of the following:
 - Chartered Accountants Australia and New Zealand
 - The Association of Taxation and Management Accountants
 - CPA Australia
 - The Institute of Public Accountants
- A Notary Public
- A Police Officer.

Members living overseas and foreign ID documents

Similarly to the section *ID documents we can accept*, we can accept a certified copy of a driver's licence, passport or similar travel document issued by a foreign government, if it contains your photograph and signature. The document must not have expired.

Any documents not written in English must be accompanied by an English translation prepared by an accredited translator. Both foreign and English translations must be certified.

If you're living overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- An employee of the Commonwealth or the Australian Trade and Investment Commission who is authorised and exercising his or her function in a country or place outside Australia
- A person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by someone licensed or registered to practise outside of Australia, or who holds a position in a foreign country, except for a foreign notary public.

Have you provided your TFN?

If you provide us with your tax file number (TFN), we may be able to process some requests, such as rollovers, without additional proof of identity. However, if your TFN can't be validated or you're transferring to a self-managed super fund or requesting a withdrawal, proof of identity is still required.

Read more about providing your TFN at unisuper.com.au/tfn.

Providing your certified ID documents to UniSuper

Once your ID documents have been correctly certified, you can send them to us electronically or by post.

Electronically: Use our *Upload a document* tool available at unisuper.com.au/contact-us or via your UniSuper online account.

By post: Send to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000.

Need help?

- Call **1800 331 685**, or
- visit unisuper.com.au/contact-us for more options - including chat.

How we protect your privacy

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper 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, please call **1800 331 685**.

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at August 2025 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850 | Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806 | Date: August 2025 UNIS000F80 0825